Tip Sheet 3: Managing WQs, Updating Statuses, Creating Notes

Epic Clinical Referrals

This tip sheet covers how to manage referral workqueues. To find and customize your workqueue, see Tip Sheet 1: <u>Getting Started with Scheduling Referral WQ's</u>.

Reviewing Orders Before Scheduling

- 1. When you've found your Workqueue, highlight it and double-click to open.
 - All new referral orders in your workqueue appear with a Scheduling Status of **Ready to Schedule**.

Benefit Plan	Start Date	Sched Status	Priority
MEDICARE PART A & B	02/14/2020	(0) Ready To Schedule	Within 3 days (urgent)
MEDICARE PART A & B	02/14/2020	(0) Ready To Schedule	Routine
HARVARD PILGRIM H	02/14/2020	(0) Ready To Schedule	Within 1 month

- 2. To view the order details before scheduling, highlight the referral and double-click or click Edit.
 - The *Order Details* form contains the clinical information provided when the order was submitted.

General		
Communications	Order Sp	ecific Questions
Ouden Detaile	Question	Answer
Order Details	Program:	General Dermatology
Scheduling	Location:	Main Campus
Referral/Authorization	Reason for Referral:	Acute rash / flare
Clinical Auth Status	Specialty Visit:	
En countos Form	Patient Discomfort Level:	
Encounter Form	Is there a history of skin cancer?	
Notes	Comments:	
Notifications	I/referring provider would like to be notified via In Basket in the event an appointment cannot be scheduled for this patient:	

- Additional notes or comments appear in the *Notes* form with a date/time stamp and name of the user.
- Notes are organized into tabs by the type of note (Specialty Comments, Referring Department Comment, etc.).

General	Notes			<u>D</u> elete			Print
Communications							_
Order Details	All Notes	General	Provider C	Referring Dep	. Specialty	Team Care	UM Comment:
Scheduling	Type A.	. Summary			User	Date	Time
Referral/Authorization	Specialty Cor	(More) Patient	would like to be a	een by Smith in	MARROQUIN, ST	EFANIE 2/18/202	0 10:36 AM
Clinical Auth Status							
Encounter Form							
Notes							
Notifications							

Scheduling an Appointment from a Referral

1. When you are able to schedule the appointment, highlight the referral in the workqueue and click **Assign** on the toolbar.

Referral	Workqueue	- MGH	DERMATOLOGY [6572]	Last refre
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2. From the appointment list activity, if an appointment:

Is already scheduled for this referral -

Assign the referral to the existing appointment by highlighting the desired appointment and clicking **Assign** with the green checkmark on the toolbar.

Click Make Appt on the toolbar.

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 ← Referral ID: Class: Class: Referred by: Xatt: Requested: Scheduled: Diagnosis: 		ral ID: red by: ested: luled: osis:					1: In Fi 1	5113663 ternal ENDER: eb 18, 20	SON, DANIEL 020	. E	
Daete Time Appt Status Status						Status		Type	Dept/Lo		Provider/Resource
								NO	data to dis	piay	

Result: Once the appointment is scheduled, the referral automatically falls off the workqueue and the Scheduling Status automatically updates from "Ready to Schedule" to "Scheduled."

Documenting Outreach to Patient for Scheduling

Any attempts to reach patients to schedule referrals must be documented in Epic.

NOTE: The recommended interval for outreach to the patient is 3 attempts over 2 weeks.

<u>International patients</u>: Please contact the international office for patients whose phone numbers have international dialing codes.

- 1. If you are unable to get ahold of the patient, click **New Call** on the toolbar.
- 2. The date/time of your attempted outreach defaults. Select the *Communication type* used.
- 3. In the *Comments* field, type a message regarding the outcome of the outreach attempt.

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C	Co	ommunication Entry	j 📂 🛛 🗳
Date	4/7/2021	Time: 07:56:02 AM ()	Outgoing O Incoming
Contacting	:	9	Contact:
Contact name	:		
Communication type	Telephone	Pt Q	none number:
Outcome	:	2	
Comments	: Left message on v	oicemail	
			Accept <u>C</u> ancel

Role(s): Cadence Schedulers/Referral Users

4. Click Accept.

Result: The Sched Status column automatically updates from "Ready to Schedule" to "Called 1x."

• After selecting 'New Call' a second and third time, the Sched Status for the referral will update to "Called 2x" or "Called 3x", respectively.

eferral/Authorization Workqueue - MGH ORTI C Refresh C Defer ▼ Filter - Notes Astign Active (Total: 109) Deferred (Total: 0)	HOTICS AND	PROSTHETICS (BF Show Mine Area Edit	KACE SHOP) [8313]	
Sched Instructions	Patient MRN	Sched Status	# Of Davs in WO	
BOLT WILSON	10031375	(0) Ready To Sche	adule 1	
CARPENTER WILSON	10031813	(U) Ready to Sche	dule 1	
BRACE, WILSON	10031623	(0) Ready To Sche	dule 1	
C Refresh Defer ▼ Filter N Active (Total: 109) Deferred (Total	lotes ജൂAssi : 0)	ign To User 🗸 🔎	w Mine 🛛 🖍 Edit 💌 /	Assign 🛗 Sched St
Sched Instructions A Name		Patient MRN	Sched Status	# Of Days in WQ
BOLT, WIL	SON	10031375	(1) Called 1x	1
CARPENT	ER, WILSON	10031813	(0) Ready To Schedule	1
BRACE,W	ILSON	10031623	(0) Ready To Schedule	1
ALPS,CON	INOR	10032654	(0) Ready To Schedule	1

• You can send Patient Gateway portal messages to patients as part of your outreach and document this using the 'New Call' button. To send patients a Patient Gateway message, click the In Basket tab and then click **New Patient Msg**.

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☆ 📼	🖻 🛗	<u>6</u>	合商	Ref	ferral/Authoriz	ation Workque	e
In Basket	Kang New Msg	Ne 🎦	w Patient N	/lsg ·	CR <u>e</u> fresh	🛃 Edit <u>P</u> ool	s d
My M	lessages	-	<u></u>				
All Re	eminders		Favorite Searches				

• All outreach documented via the 'New Call' button can be viewed from the workqueue in the Communications section.

Referral/Authorization Workqueue - MGH ORTHOTICS AND F								
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Active (Total: 109)	Deferred (Total: 0)							
Sched Instructions	Name	Patient MRN						
	BOLT, WILSON	10031375						
	CARPENTER, WILSON	10031813						
	BRACE, WILSON	10031623						
	ALPS,CONNOR	10032654						
<								
Communicati	ons							
Telephone								
Regarding:	Regarding: Referral							
Entered by:	Sally Brussels							
Contacted:	Contacted:							
Outcome:								
Comments:	Left message o	n voicemail						

Role(s): Cadence Schedulers/Referral Users

Last Updated: 4/15/2021

• The Sched Status also displays in the *Scheduling* form of the referral record.

General	Schedulina
Communications	J
Order Details	
Scheduling	Status
Referral/Authorization	(1) Called 1x
Clinical Auth Status	

• A full history of notes and status changes can be seen by clicking **View History** on the toolbar of the referral.

F	eferral for	r Zzzzpł	ısp	erstest, <u>Eightyf</u>	ive					
	Print on Accept	Referral Co	ounts	Adj Trace View Histo	ry Chart	🖻 In Basket Msg	Appt Desk	View Notes	₩ <u>Q</u> Summary	
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ſ	duent FT.		1	4						View History
				Referral Audit Trail						
				Date and Time	Change	Гуре	Des	scription		
	General		L	02/18/2020 10:57 AM	Change	Scheduling Stat	us Fro	m (0) Ready T	o Schedule to (1) Called 1x
	Communic	ations	L	02/18/2020 10:28 AM	Scheduli	ng Status Auto /	Assign (No	ne) to (0) Read	dy To Schedule ·	internal referrals which are
	Order Deta	ails		02/18/2020 10:28 AM	Set Auto	-status	Aut	o-Status: New	Request	
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	Clinical Aut	th Status		02/18/2020 10:28 AM	Refreshe	d Coverages	Via	auto-approval	check	
	Encounter	Form		02/18/2020 10:28 AM	Create R	eferral	Cre	ated from Orde	er 650822260	
	Notes									
	Notification	ns								

• Any authorization information/additional details about a referral should be documented in the *Notes* form of the referral record for tracking.

General	Notes		<u>D</u> elete	
Communications	All Notes	General	Provider C	Refe
Order Details	Type A	Summary		
Scheduling				
Referral/Authorization				
Clinical Auth Status	Туре			
Encounter Form	☆ B 🕀 🥸	5 ₽ + Insert	SmartText 📑 😓	⇒.
Notes				
Notifications				
Dx/Px				
Flags				

Viewing Outreach Attempts ("Referred by" Departments)

Referred by departments can view outreach attempts and comments entered by users about the outreach attempt via the *Communications* form of the referral record.

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Deferring a Referral

The Defer feature allows you to move the referral from the Active tab to the Deferred tab for a specified time. This is particularly helpful for times when the patient may be going away and will not be contacted again until they return.

- 1. To Defer a referral, select the referral on your workqueue and then click **Defer** on the toolbar (you can also right-click on the referral and select **Defer**).
- 2. Specify a date range according to outreach protocol and add any helpful notes in the Message box.
- 3. Click Accept.

Result: The referral automatically moves to the **Deferred** tab and won't appear on the Active tab again until the specified date.

Referral Workqueue - MGH A	ACUPUNCTURE - IN	79] La	Last refreshed	
<u>∂R</u> efresh SActivate Tilter - DNote	₩Assign To User - 🔎 Show	v Mine 🛛 💉 Edit 🖹	🖬 Assign 🛗 Sc <u>t</u>	ned St 🐛 New Ca
Active (Total: 29) Deferred (Total: 1)				
Patient MRN Name	Referral Class	Patient MRN	Start Date	Sched Status
5796749 ZZZZPHSPERSTEST,EIGH	HTYFIVE Internal	5796749	02/18/2020 (1) Called 1x

If a Referral Can't be Scheduled

There are times when the referral cannot be scheduled either because the patient can't be reached, they decline the appointment, or the referral was received in error. When this happens, you should take the following actions to update the *Scheduling Status* and remove the referral from your workqueue.

1. Open the referral and click the **Notes** form. Add a new **Specialty Comment** specifying details on why the appointment cannot be scheduled. This will be viewable by the referring department, so add as much detail as possible. This is particularly important when there was an error with the referral submission (e.g., "Incorrect order" or "Referred to wrong department").

Role(s): Cadence Schedulers/Referral Users

Communications All Notes General Provider C Re Order Details Type ASummary Scheduling Referral/Authorization Type Clinical Auth Status Type Insert SmartText Image: Communication Notes Notifications Dx/Px Dx/Px Image: Communication Image: Communication	General	Notes		<u>D</u> elete	
Order Details Type A Summary Scheduling Referral/Authorization Clinical Auth Status Type Encounter Form Image: State of the state of th	Communications	All Notes	General	Provider C	Refe
Scheduling Referral/Authorization Clinical Auth Status Encounter Form Notes Notifications Dx/Px	Order Details	Type A	Summary		
Referral/Authorization Clinical Auth Status Encounter Form Notes Notifications Dx/Px	Scheduling				
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Notifications Dx/Px	Notes				-
Dx/Px	Notifications				
	Dx/Px				
Flags	Flags				

- 2. After adding any notes, click the **Scheduling** form of the referral record to update the scheduling **Status**. If you will not schedule the appointment for reasons listed above, you should select:
 - Unable To Schedule Availability
 - Unable To Schedule No Response
 - Unable To Schedule Non Contracted Plan
 - Unable To Schedule Other (Provide Notes)
 - Unable To Schedule Patient Declined
 - Unable To Schedule Scheduled Elsewhere
 - Unable To Schedule Wrong Department

General Communications Order Details	Scheduling Status Schedule by (1) Called 3x
Scheduling	+ E: O Category Select
Referral/Authorization Clinical Auth Status Encounter Form Notes Notifications Dx/Px Flags	No app Search: Title (2) Unable To Schedule - Availability (2) Unable To Schedule - No Response (2) Unable To Schedule - Non Contracted Plan (2) Unable To Schedule - Other (Provide Notes) (2) Unable To Schedule - Patient Declined (2) Unable To Schedule - Schedule delsewhere (2) Unable To Schedule - Vortine Vortes) (2) Unable To Schedule - Patient Declined (2) Unable To Schedule - Wrong Department

- 3. To save the changes on the referral, click **Accept** at the bottom of the screen.
 - Updating the referral to any of the statuses above automatically removes the referral from your workqueue and returns it to the sending practice for review. For this reason, it is very important that you add any notes to the referral before changing the status. The auto-removal keeps your workqueue clean and populated only with referrals that need to be scheduled.

NOTE: It is very important that only the Scheduling status is updated in the referral from the Scheduling form. The Status field below <u>doesn't</u> directly impact your referral scheduling workqueue and shouldn't be used for status changes related to scheduling the clinical ambulatory referral order.

Referral for Zzzzphsperstest, Eightyfive									0 Z X	
Print on Accept	Referral C <u>o</u> unts	E Adj Trace	View <u>H</u> istory	Chart	🖻 In Basket Msg	Appt Desk	View Notes	☐ W <u>Q</u> Summary	Do not change!	
Insurance: BLUE CROSS BLUE SHIELD / BLUE CROSS BLUE BENEFITS ADMINISTRATORS				DOB:	DOB: 2/2/1989		15113663			
Procedure:	REF11860 - AMB REFERRAL TO MGH ACUPUNCTURE (ONCOLOGY USE ONLY)			Referring P	Referring Provider: HENDERSON, DANIEL E		Status New Request			
Diagnosis: Patient FYI:	FYI			Scheduling Flags:	Scheduling Status: (1) Called 1x Flags:					
									Reason	

Role(s): Cadence Schedulers/Referral Users