

# 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: [Getting Started with Scheduling Referral WQ's](#).

## Reviewing Orders Before Scheduling

- 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

- 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	Order Specific Questions
<ul style="list-style-type: none"> <li>Communications</li> <li><b>Order Details</b></li> <li>Scheduling</li> <li>Referral/Authorization</li> <li>Clinical Auth Status</li> <li>Encounter Form</li> <li>Notes</li> <li>Notifications</li> </ul>	Question Program: Location: Reason for Referral: Specialty Visit: Patient Discomfort Level: Is there a history of skin cancer? Comments: /referring provider would like to be notified via In Basket in the event an appointment cannot be scheduled for this patient.
	Answer General Dermatology Main Campus Acute rash / flare

- 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												
<ul style="list-style-type: none"> <li>Communications</li> <li>Order Details</li> <li>Scheduling</li> <li>Referral/Authorization</li> <li>Clinical Auth Status</li> <li>Encounter Form</li> <li><b>Notes</b></li> <li>Notifications</li> </ul>	Delete Print All Notes General Provider C... Referring Dep... Specialty ... Team Care UM Comment <table border="1"> <thead> <tr> <th>Type</th> <th>A..</th> <th>Summary</th> <th>User</th> <th>Date</th> <th>Time</th> </tr> </thead> <tbody> <tr> <td>Specialty Co</td> <td></td> <td>(More) Patient would like to be seen by Smith in</td> <td>MARROQUIN, STEFANIE</td> <td>2/18/2020</td> <td>10:36 AM</td> </tr> </tbody> </table>	Type	A..	Summary	User	Date	Time	Specialty Co		(More) Patient would like to be seen by Smith in	MARROQUIN, STEFANIE	2/18/2020	10:36 AM
Type	A..	Summary	User	Date	Time								
Specialty Co		(More) Patient would like to be seen by Smith in	MARROQUIN, STEFANIE	2/18/2020	10:36 AM								

## Scheduling an Appointment from a Referral

- 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 refe
Refresh Defer Filter Note Assign To User Show Mine Edit	<input checked="" type="checkbox"/> Assign

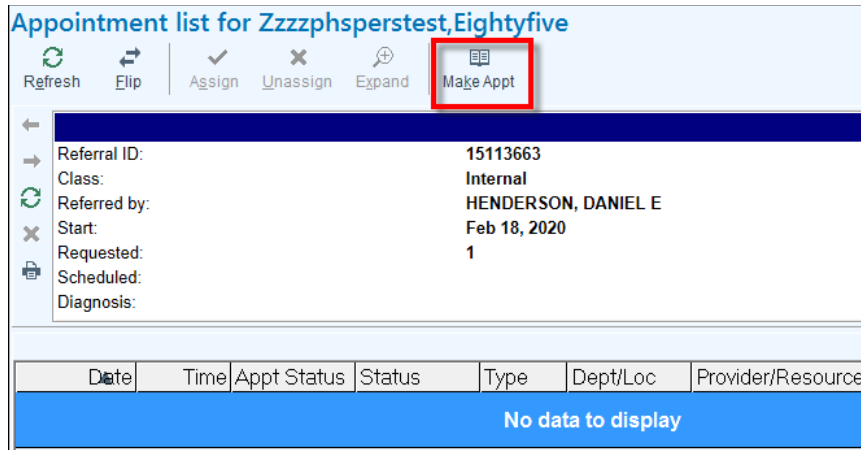
2. From the appointment list activity, if an appointment:

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.

Needs to be scheduled –

Click **Make Appt** on the toolbar.



**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.”

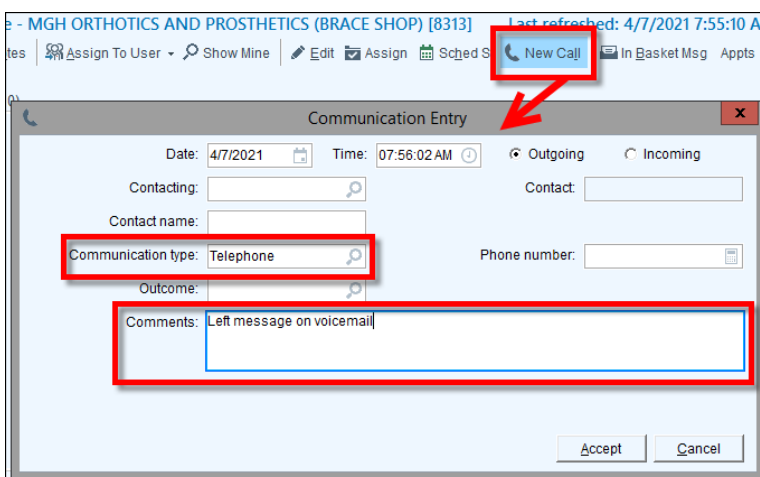
## Documenting Outreach to Patient for Scheduling

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.

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

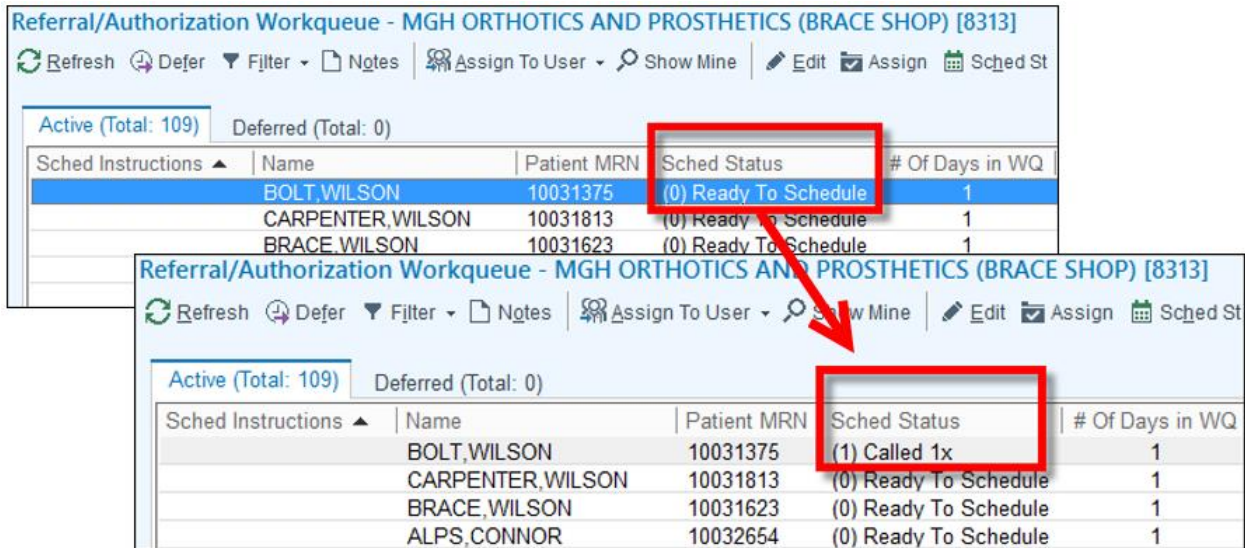
1. If you are unable to get ahold of the patient, click **New Call** on the toolbar.
2. The date/time of your attempted outreach defaults. Select the **Communication type** used.
3. In the **Comments** field, type a message regarding the outcome of the outreach attempt.



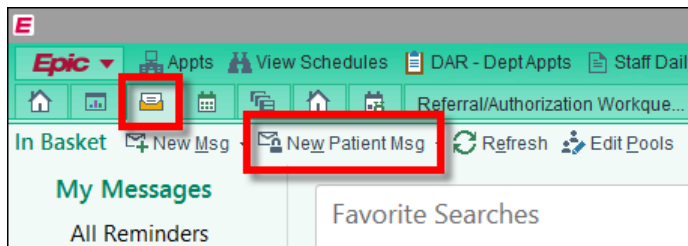
4. Click **Accept**.

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

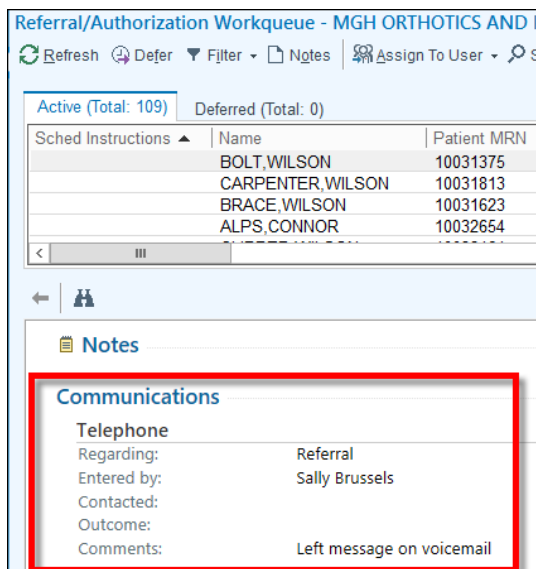
- After selecting ‘New Call’ a second and third time, the Sched Status for the referral will update to “Called 2x” or “Called 3x”, respectively.



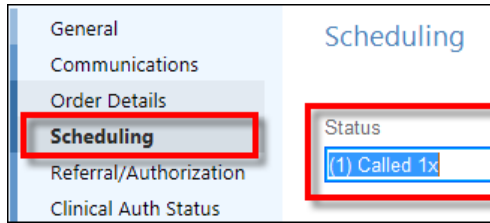
- You can send Patient Gateway portal messages to patients as part of your outreach and document this using the ‘New Call’ button. To send patients a Patient Gateway message, click the In Basket tab and then click **New Patient Msg**.



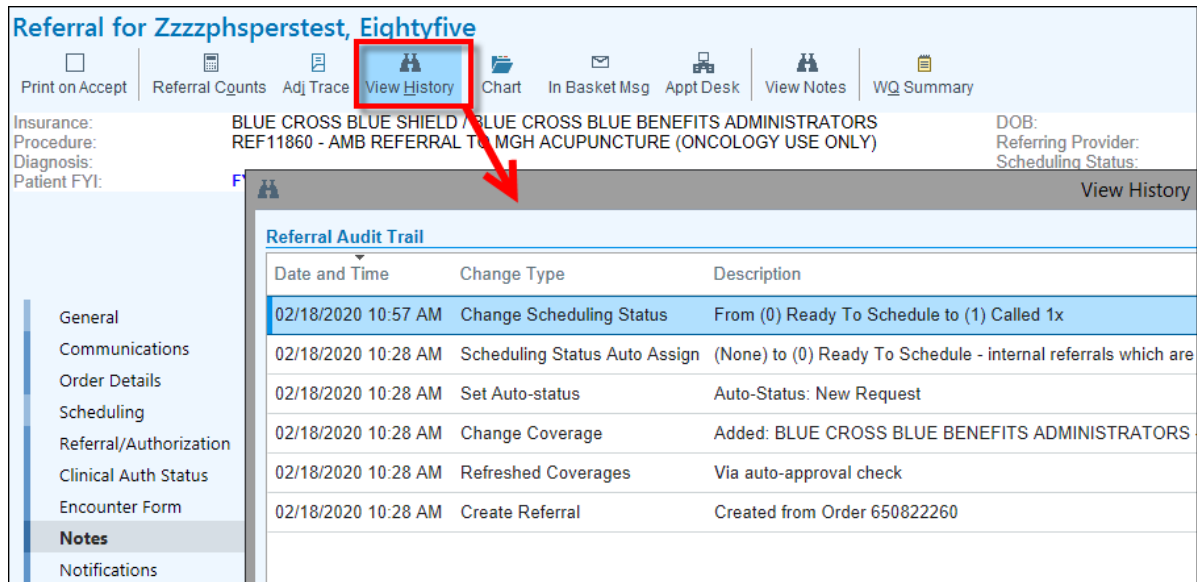
- All outreach documented via the ‘New Call’ button can be viewed from the workqueue in the Communications section.



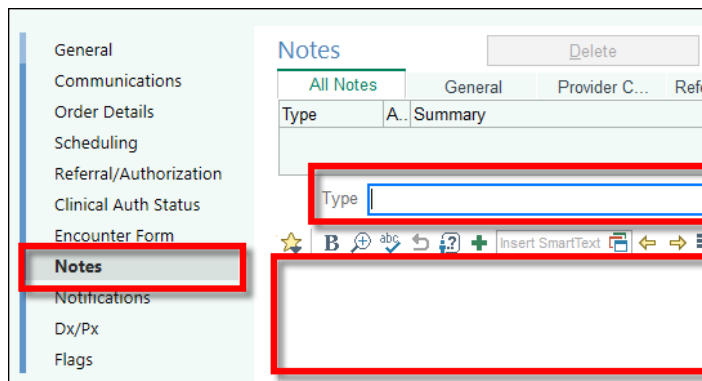
- The Sched Status also displays in the **Scheduling** form of the referral record.



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



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



## 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.

Referral for Upgtooneonetwofivea, Epicmgh

Print on Accept | Referral Counts | Adj Trace | View History | Chart | In Basket Msg | Appt Desk

Insurance: AETNA / AETNA HMO POS EPO      DOB: Referring P  
 Procedure: REF11713 - AMB REFERRAL TO MGH INTERVENTIONAL RADIOLOGY  
 Diagnosis:      Scheduling Flags:

General  
**Communications**  
 Order Details  
 Scheduling  
 Referral/Authorization  
 Clinical Auth Status  
 Encounter Form  
 Notes  
 Notifications  
 Dx/Px  
 Flags

Communications

+ Communication

Date/Time	Communication type	Co
04/13/2021 09:31:21 AM	Telephone (Outgoing)	
Left message on voicemail		
04/13/2021 09:31:33 AM	Patient Portal Message (Outgoing)	
Sent message on PG in addition to calling		
04/13/2021 09:31:56 AM	Telephone (Outgoing)	
Left voicemail again.		
04/13/2021 09:32:45 AM	Telephone (Outgoing)	
Voicemail full, could not leave message.		

## 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 ACUPUNCTURE - INFUSION [9479]      Last refreshed

Refresh | Activate | Filter | Note | Assign To User | Show Mine | Edit | Assign | Sched St | New Ca

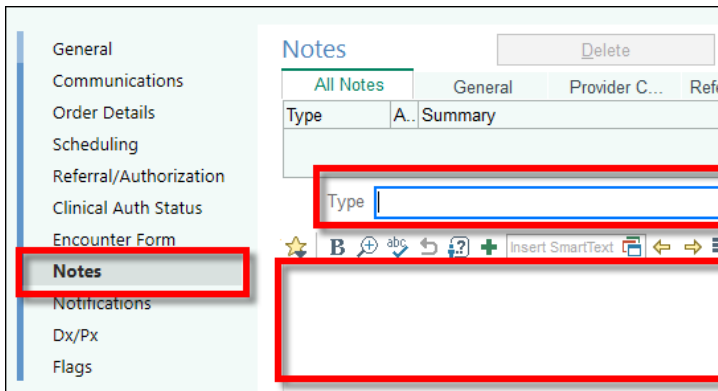
Active (Total: 29)      **Deferred (Total: 1)**

Patient MRN	Name	Referral Class	Patient MRN	Start Date	Sched Status
5796749	ZZZZPHSPERSTEST,EIGHTYFIVE	Internal	5796749	02/18/2020	(1) Called 1x

## If a Referral Can't be Scheduled

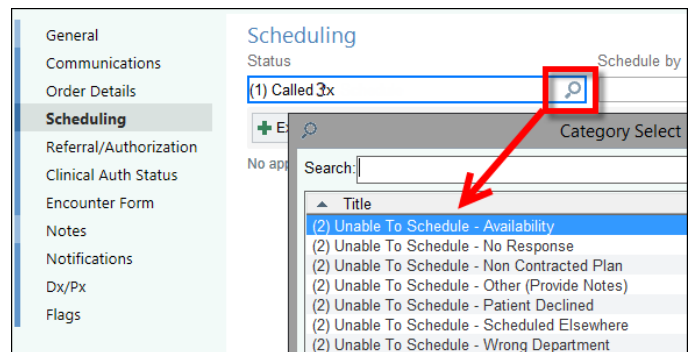
There are times when the referral cannot be scheduled either because the patient can't be reached, they decline the appointment, or the referral was received in error. When this happens, you should take the following actions to update the **Scheduling Status** and remove the referral from your workqueue.

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").



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**



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 doesn't directly impact your referral scheduling workqueue and shouldn't be used for status changes related to scheduling the clinical ambulatory referral order.

