Tip Sheet 5: Running the Referral Tracking Report

Epic Clinical Referrals

The **PHS Amb Referral Tracking by Login Dept – Include PT, OT, Nutrition** report shows referrals sent by your Epic department or DEP (i.e., the department you are logged into when you view the report) to another practice.

The **PHS AMB Referral Tracking BY X Department – Include PT, OT, Nutrition** can also be run if you are responsible for multiple departments or DEPs so you don't need to change your login department multiple times to view the report.

Returned Referrals

If a "referred to" department sends back a referral to the "referred from" department, it's the "referred from" user's responsibility to know what their practice protocol is. When a referral is returned, the "referred from" department should take their determined action within 7 days. 7 days is the institution standard.

If the referring provider wants to cancel the order, users in the "referred from" department should follow their department protocol on who should cancel the referral, the referring provider or the Cadence user.

Running the Referral Tracking by Login Department Report

1. Click **Epic** > **Reports** > **My Reports**.
2. Click the **Library** tab.
3. In the Search field, type "phs amb ref trac" and then press **Enter**.
4. Hover over the **PHS Amb Referral Tracking by Login Dept – Include PT, OT, Nutrition** and click **Run**.

Customizing the Referral Tracking Reports

1. From the Library tab, hover over the report and click **Edit**.
2. The Report Settings window *Criteria* tab allows you to view and adjust the reporting criteria. There are default selections.
    *   Click on any of the sections to edit the criteria.
    *   Click the **magnifying glass** in the *Find Criteria* field to insert additional criteria.
    *   To add/edit any of the columns on the report, click the **Display** tab, select a column, and then click the right-facing arrow.

        Criteria tab
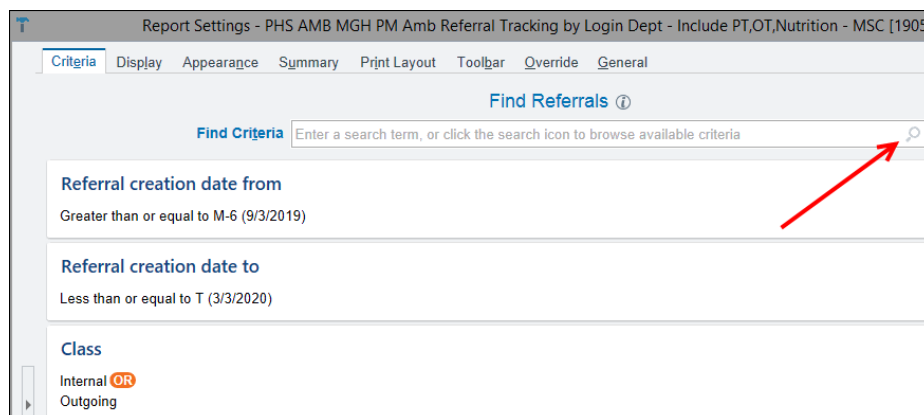
Display tab
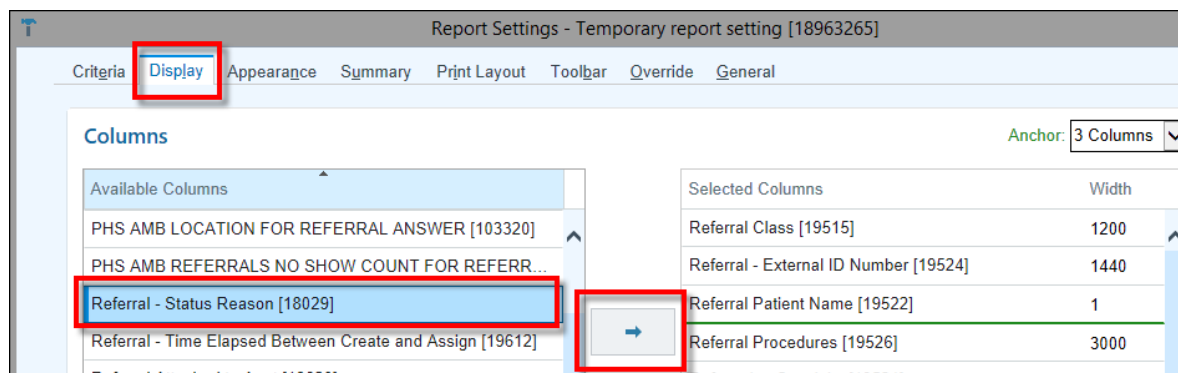
3. Once your report criterion and display have been set, save the report by clicking **Save As** at the bottom of the Report Settings window. This allows you to save all your selections for quick utilization in the future.

4. Enter a name for the report using the naming convention: the report name followed by your department name. For example, someone logged into the MGH Vascular department who only wants to see referrals sent by MGH Vascular would name the report: *PHS Amb Referral Tracking by Login Dept – MGH Vascular*.

5. Click the **star** next to the saved report to add it to your favorites.

Sorting & Filtering the Referral Tracking Reports

Sorting Reports

After running the report, you have the option to sort report results by clicking on the column you wish to sort. An upward facing arrow and a number will appear in the top-right of the selected column header. You may sort up to three columns.
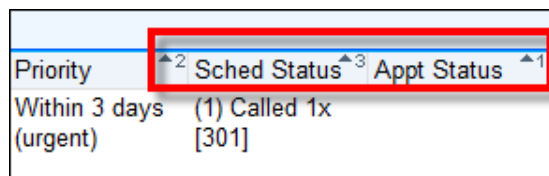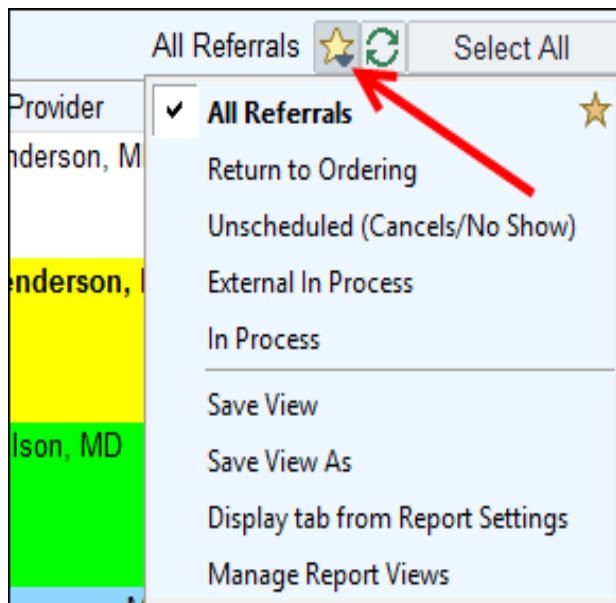

Filtering Reports

Default filters

After running the report, there are two ways to **Filter** report results:

- For a list of pre-existing filters, click on the star-arrow icon from the top-right corner. The 5 pre-existing filters are defined here:

All Referrals: Defaults to show all referrals, unless you set a different default (See Manage Report Views below).

Return to Ordering: All referrals returned to you by the receiving department. Referrals will appear in Yellow and include the following Scheduling Statuses: Unable To Schedule – Availability, *Unable To Schedule - Other (Provide Notes), Unable To Schedule - No Response, Unable To Schedule – Non Contracted Plan, Unable To Schedule – Scheduled Elsewhere, Unable To Schedule – Wrong Department*

Return to Ordering: Referrals returned to your department for reason of: *Unable To Schedule - Patient Declined*

Unscheduled: Cancellations and No-Shows are still the responsibility of the receiving department. They should either attempt to reschedule or, if unsuccessful, return the referral to you.

External In Process: Referrals sent from your department using *AMB Referral to External* referral orders.

In Process: Referrals still being reviewed/scheduled by the receiving department will appear in banded white and blue.

Scheduled: Referrals that have been successfully scheduled will appear in Green.

Save View – Save the parameters of the pre-existing filter currently in use. For example, if you sort the All Referrals view by Priority, the sort will automatically be implemented next time you view All Referrals.

Save View As – Give your customized view a title. It will be added to the list.
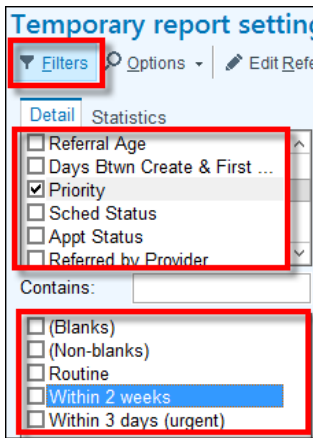
Manage Report Views – set a default filter or delete any unneeded filters.
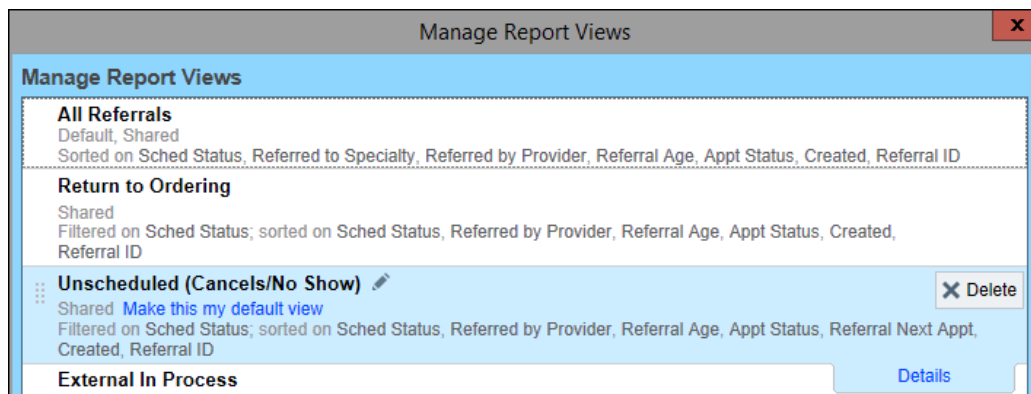
Manual Filters

To create a customized filter, click **Filters** on the toolbar of the report.

- You can combine numerous criteria and use the **Star** > **Save View As** button to save. These will be added to your menu of pre-existing filters.

Changing Report Settings

To change any of the report criteria, from the report toolbar, click **Options** > **Edit Report Settings**. The **Report Settings** window appears, and you can adjust the criteria as necessary.

PLEASE NOTE: **PHS Amb Referral Tracking by Login Dept – Include PT, OT, Nutrition** is a dynamic report that allows you to select and act on a referral directly from the report, if needed. After selecting the referral you wish to manage, a new toolbar will appear that allows you to edit the referral, access the patient's Appt Desk, view the patient's chart, and send an In Basket message.
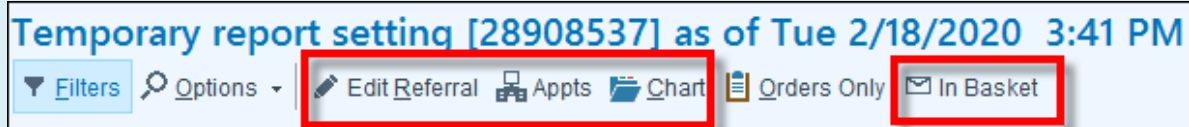

Report Criteria Tips

Below is an explanation of the default criteria that are pre-selected and what they signify. **Most likely these criteria will need to be adjusted the first time you run your report,** so it is important that you review and edit as needed. To adjust any of these criteria, simply click on the criteria heading and edit the fields that appear in that section.

a. **Date Range:** The default date range is from 1 year ago (Y-1) until today (T). You may change the date range in the report as needed using the **Referral creation date from** and **Referral creation date to** criteria.

b. **Class:** the default referral classes are *Internal* and *Outgoing*. There are three referral classes to choose from:

> **Internal:** referrals sent from one Partners Healthcare department to another
>
> **Incoming:** referrals sent by an external provider (i.e., not affiliated with Partners Healthcare) that are received by a Partners Healthcare department
>
> **Outgoing:** referrals that a Partners Healthcare department sends to a provider outside of Partners Healthcare

c. **Referred to Provider Specialty:** The default specialty is NOT *Home Health Services*.

d. **Scheduling Status**: the scheduling status field defaults to NOT *e-Consult, Final Review Complete – Referring Department, Some Visits Complete, All Visits Complete, External – All Visits Complete,* and *External – Some Visits Complete*. Click this section to add any other scheduling statuses.

e. **Referral Type**: the default Type is NOT *Home Health Care*.

f. **Procedure record name**: Contains Referral To

g. **Reason Closed**: the default Reason Closed is NOT *Duplicate/Erroneous Record*

h. **Passes rfl context rule**: PHS AMB Referrals with no completed appts and passes rfl context rule: 1

i. **Referring department**: Runs the report based on your login department

Refreshing Report Results

The refresh icon it the top-right corner of the **PHS AMB Referral Tracking By Login Dept – Include PT, OT, Nutrition** report *only updates the referrals already listed in the report*. Clicking on the refresh button will NOT show new referrals that were entered into the system after the report was run.
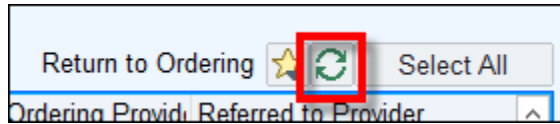
In order to see newly created referrals, you must close out of the report and re-run the report.

Scheduling Status Behavior

Status	Abbreviation	WQ Behavior	Comment
(1) Called 1x	Call-1	Remain on WQ	Manually changed. Status remains until manually changed again or appointment is linked to referral.
(1) Called 2x	Call-2	Remain on WQ	
(1) Called 3x	Call-3	Remain on WQ	
(1) Pending Authorization	Pend	Remain on WQ	
(2) Unable To Schedule – Availability	Unable A	Exit WQ	
(2) Unable To Schedule – No Response	Unable Cntct	Exit WQ	
(2) Unable To Schedule – Non Contracted Plan	Unable NC	Exit WQ	
(2) Unable To Schedule – Other (Provide Notes)	Unable to Sc	Exit WQ	
(2) Unable To Schedule – Patient Declined	Pat Decl	Exit WQ	
(2) Unable To Schedule – Scheduled Elsewhere	Unable SE	Exit WQ	
(2) Unable To Schedule – Wrong Department	Unable WD	Exit WQ	
(3) Final Review Complete – Referring	Final Review	Exit WQ	
(4) External – All Visits Complete	Ext Some Com		Autostatus – Changes if an external appointment is added to or removed from an external referral. Only applied to external referral workqueues (results vary as decided by site)
(4) External – Ready To Schedule	Ext Ready		
(4) External – Scheduled	Extscheduled		
(4) External – Some Visits Complete	Ext Sme Comp		
(9) Auto Status – All Visits Complete	Complete	Exit WQ	Changes to this status when an appt is linked to a RFL and # of linked completed visits equals # of requested visits

Status	Abbreviation	WQ Behavior	Comment
(9) Auto Status – All Visits Scheduled	All Sch	Exit WQ	Changes to this status when an appt is linked to a RFL and # of linked scheduled visits equals # of requested visits
(9) Auto Status – eConsult	E-Consult	Remain on WQ	Applies only to e-Consult workflow
(9) Auto Status – Expired	Expired	Exit WQ	Changes to this status when RFL is expired
(9) Auto Status – Order Cancelled	ORCX	Exit WQ	Changes to this status only when the provider has canceled the order which generated the RFL
(9) Auto Status – Patient Deceased	Pt Deceased	Exit WQ	Changes to this status only when the appropriate workflow for marking a patient deceased
(9) Auto Status – Scheduled	Scheduled	Exit WQ	Changes to this status when an appt is inked to a RFL and # of linked scheduled visits equals # of requested visits
(9) Auto Status – Some Visits Complete	Some Comp	Exit WQ	Changes to this status when an appt is inked to a RFL and # of completed visits linked is less than requested amount
(9) Auto Status – Some Visits Scheduled	Some Vis Sch	Exit WQ	Changes to this status when an appt is inked to a RFL and # of scheduled visits linked is less than requested amount and there are no completed appts
(9) Auto Status – Unscheduled	Unscheduled	Enter WQ	Changes to this status when a linked appt is canceled