Referral Management: Flow of Referrals Through the Worklists for Referral Coordinators

Cerner PowerChart Ambulatory **EDUCATION**

Outgoing Referrals through Originating Worklists

1. A referral order is placed by a provider within PowerChart.
2. The referral populates on the **Originating: To Send** worklist.
    a. These are referrals that need to be sent to the receiving location.
    b. Contains: **Not Started** and **Prep for Send** referral statuses.
3. The referral is worked (see Clinical EHR Education website for details) and sent to the receiving facility.
4. The referral will then move to the **Originating: Monitoring** worklist.
    a. To assist with ease of monitoring sent referrals to ensure that outbound external referrals are being scheduled and patients are being seen for their referrals.
    b. Contains: **Sent** and **Scheduled** referral statuses.
5. The **Originating: Review** worklist must be monitored for rejected or cancelled referrals.
    a. Outbound referrals that have come back from the refer to location with a reason need to be triaged for further action.
    b. Contains: **Rejected** and **Canceled** referral statuses.
6. The referral will end up on the **Originating: Complete** worklist once it has been completed or closed.
    a. Outbound referrals that have been completed and documentation has been sent back from the referred to clinic. Internal referrals should have the clinic note already attached to the completed referral. External referrals will need to have the documentation scanned into the patient's chart and then attached to the referral. The status is then updated to Closed.
    b. Contains: **Complete** and **Closed** referral statuses.

Incoming Referrals through Receiving Worklists

1. A referral is sent from another practice using Cerner Referral Management.
    a. Outside referrals may be received via fax or secure messaging. These referrals need to be added to Referral Management manually using the Add Inbound Referral button within Referral Management.
2. An incoming referral populates onto the **Receiving: Pending Acceptance** worklist.
    a. Inbound referrals need to be reviewed and accepted before being scheduled.
        i. Referrals may be rejected if not appropriate.
    b. Contains: **Pending Acceptance** referral statuses.
3. Once accepted, the referral moves to the **Receiving: Accepted** worklist.
    a. Inbound referrals that have been accepted and are awaiting scheduling.
    b. Contains: **Accepted** referral statuses.
    c. Once the appointment has been scheduled, the referral will drop off the worklist.
4. The **Receiving: Reschedule** worklist contains referrals that are awaiting rescheduling (i.e., patient cancels or no shows the originally scheduled appointment).
    a. Contains: **Pending Reschedule** referral statuses.
    b. Once the appointment has been rescheduled, the status will change to Scheduled and will drop off the worklist.

5. The **Receiving: On Hold** worklist contains referrals that have been manually changed to the On Hold status because they are awaiting further information before continuing with the workflow (i.e., prior authorization information). Update to the appropriate status once the information has been received.
   a. Contains: **On Hold** referral statuses.
   b. This is an optional worklist that may be used per practice guidelines.
6. The final worklist for incoming referrals is the **Receiving: Referral Completion** worklist.
   a. Inbound referrals that need documentation attached and to be marked as completed. External referrals will need to have the office note faxed back to the originating facility via Medical Record Request as well. The Status is then updated to Completed.
   b. Contains: **Patient Seen** referral statuses.