Referral Management Settings and Preferences for Referral Coordinators

Summary: Referral Management provides a streamlined means to transfer and monitor inbound and outbound referrals. Referral Management also offers integration with Revenue Cycle scheduling for a seamless workflow to manage inbound referrals. The correct settings and Worklists must be set.

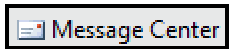
When: October 18, 2021

Support: Ambulatory Informatics at 231-392-0229.

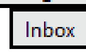
Settings

Ensure Provider Letter Settings are correct.

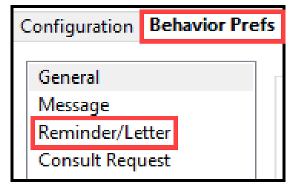
1. Click on **Message Center**.



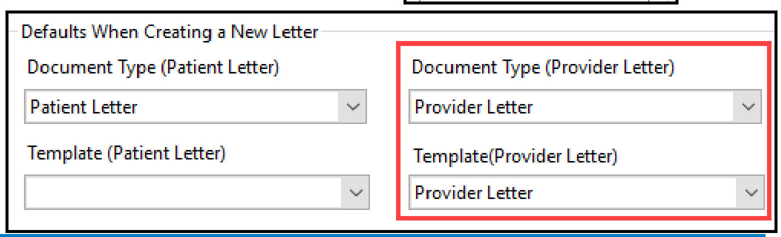
2. Click on **Inbox** on the top toolbar.



3. Click **Manage Preferences**.
4. Click on the **Behavior Prefs** tab and click on **Reminder/Letter** on the left.



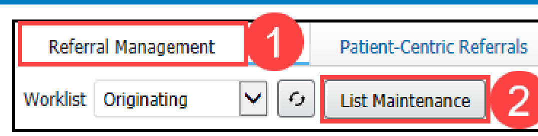
5. Locate **Defaults When Creating a New Letter** and select **Provider Letter** as the **Document Type (Provider Letter)** and the **Template (Provider Letter).**
6. Click **OK.**



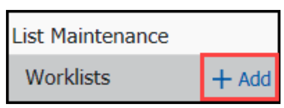
Creating Worklists

To create and/or manage Referral Management Worklists:

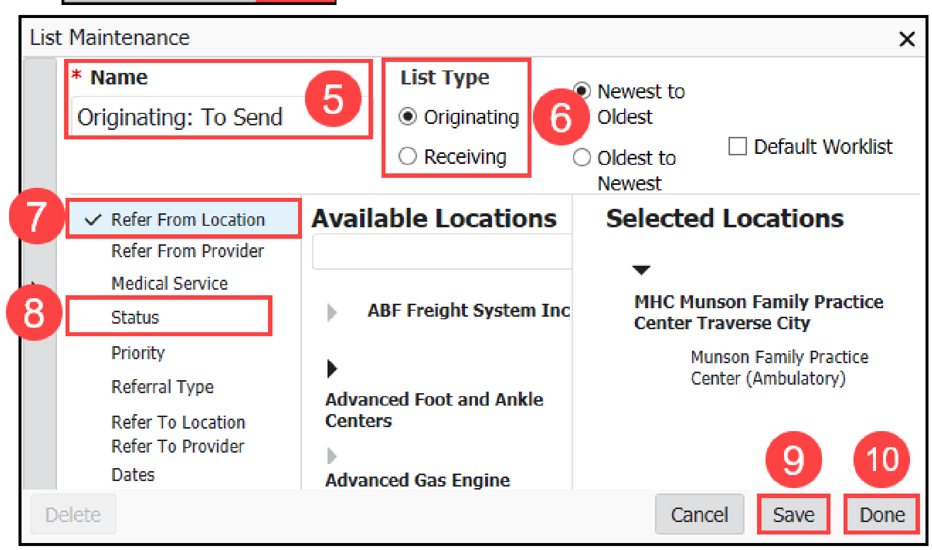
1. Navigate to Referral Management within Revenue Cycle or PowerChart. (The Worklists created in one will flow to the other application).



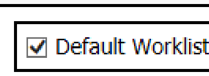
2. Click on **List Maintenance**.
3. Click on **Add** to create a new Worklist.



4. Following the [worklist specifications below], create a separate Worklist for each.
5. Type in the correct **name.**
6. Select the **List Type.**
7. Select the **Refer From/To Location.** This is the location(s) that you will be managing referrals for.
8. Select the **Status(es)**.
9. Click **Save.**
10. Click **Done.**
11. Click Add again to continue creating the next list.



Note: The Default Worklist is automatically selected when you create your first worklist.

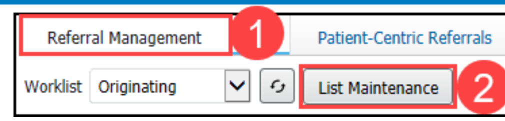


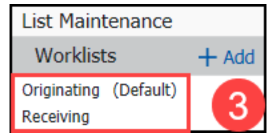
This check box defines which Worklist the system displays by default when opening/refreshing Referral Management. If a default worklist is not selected, a worklist must be manually selected each time Referral Management is opened.

Modifying a Worklist

Complete the following steps to modify a Worklist:

1. Navigate to Referral Management within Revenue Cycle or PowerChart.
2. Click on **List Maintenance**.
3. Select the Worklist to modify.
4. Make one or more changes to your Worklist.
5. Click **Save** to save your Worklist.
6. Click **Done** to save your Worklist and close the List Maintenance screen.





Worklists to create

<u>Originating Worklists:</u>

Originating: To Send

- Name: Originating: To Send
- List Type: Originating
- Status:
  - Not Started
  - Prep for Send
- Description: Referrals that need to be sent to the receiving location.

Originating: Review

- Name: Originating: Review
- List Type: Originating
- Status:
  - Rejected
  - Canceled
- Description: Outbound referrals that have come back from the refer to location with a reason. They need to be triaged for further action.

Originating: Monitoring

- Name: Originating: Monitoring
- List Type: Originating
- Status:
  - Sent
  - Scheduled
- Description: 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.

Originating: Complete

- Name: Originating: Complete
- List Type: Originating
- Status:
  - Complete
  - Closed
- Description: Outbound referrals that have been completed and documentation sent back from the referred to provider. Documentation needs to be reviewed and attached to the referral and the status updated to Closed.

Receiving Worklists:

Receiving: Pending Acceptance

- Name: Receiving: Pending Acceptance
- List Type: Receiving
- Status:
  - Pending Acceptance

- Description: Inbound referrals that need to be accepted prior to scheduling.

Receiving: Accepted

- Name: Receiving: Accepted
- List Type: Receiving
- Status:
  - Accepted

- Description: Inbound referrals that have been accepted and are awaiting scheduling.

Receiving: Reschedule

- Name: Receiving: Reschedule
- List Type: Receiving
- Status:
  - Pending Rescheduled

- Description: Inbound referrals that need to be rescheduled.

Receiving: On Hold

- Name: Receiving: On Hold
- List Type: Receiving
- Status:
  - On Hold

- Description: Inbound referrals awaiting information prior to moving on in the workflow, such as waiting for pre-authorization information.

Receiving: Referral Completion

- Name: Receiving: Referral Completion
- List Type: Receiving
- Status:
  - Patient Seen

- Description: Inbound referrals that have been completed. Documentation needs to be attached and sent back for any external inbound referrals and the status updated to Completed. (Documentation will be in the chart if it's internal).