Identifying and Placing Referral (Sched) Orders

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Reporting Workbench report: *E-consult encounters – Need referral*

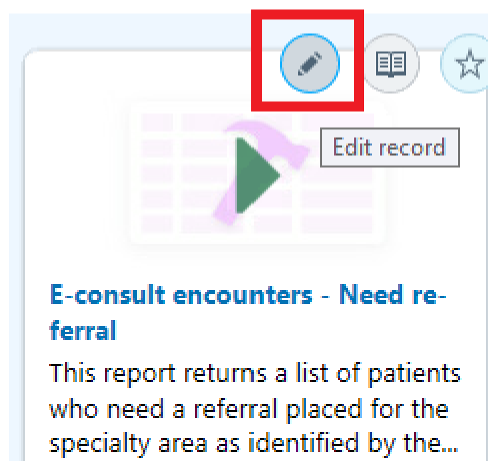
- New reporting workbench report, *E-consult encounters – Need referral*
  - Report criteria: Patients who have a disposition that identifies the need for scheduling
- Criteria can be edited to further filter results to specialty area
- Add report as a favorite to display on your dashboard

Open the report

- Open up My Dashboards activity by clicking
- Search for the ***E-consult encounters – Need referral*** report in the catalog 

  – If the search box does not appear, click on the chevron next to the dashboard name 

- Edit the report by clicking on the pencil icon



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Editing Criteria

- Show results for your department's specialty
  - Click on chevron in the ***Is Contact Department Specialty in List***
  - Find the abbreviation for the specialty area under *Department Specialties*
  - Set *Relationship* to ***Equal to***
  - Set *Is Contact Department Specialty in List* to ***Yes [1]***

Is Contact Department Specialty In List

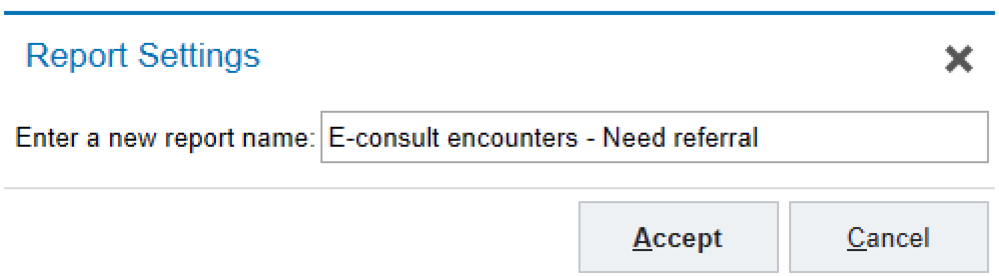
	Department Specialties	Relationship	Is Contact Department Specialty In List
1	Click magnifying glass or search for specialty area	Equal to	Yes [1]
2			

- Change Date Range
  - The date range can be changed by clicking on the pencil icon

Date Range From: T-1 (7/13/2020) To: T (7/14/2020)

Save as your own private report

- If you have edited criteria, you should save as a private report
  - Click on *General* tab
  - Click on *Save as*
  - Enter new name and click *Accept*



Report Columns

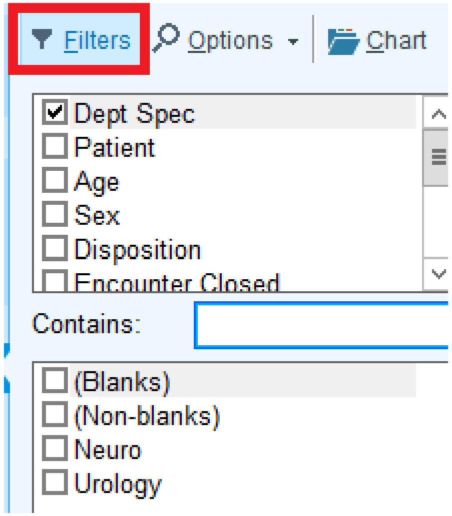
Dept Spec	Patient	Age	Sex	Disposition	Expedited visit?	Diff Specialist

Encounter Provider	Dept/Loc	Creation Date	Encounter Closed	Referring Provider	Ref Prov Phone

- **Dept Spec** – The department specialty for the e-consult department
  - See next slide on filtering by this column
- **Disposition** – Type of visit that should be scheduled
- **Expedited visit?** – Displays a ‘Yes’ if the patient needs an expedited visit
- **Diff. Specialist** – If the consulting physician indicates that patient should be seen by another physician that will be indicated here
- **Encounter Provider** – The e-consult encounter provider
- **Dept/Loc** – The e-consult encounter department
- **Creation Date** – The date that the e-consult encounter was created
- **Encounter closed** – Displays a ‘Yes’ if encounter was signed
- **Referring Provider** – Provider that placed the e-referral order

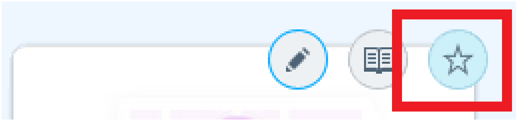
Filtering results

- If you do not want to edit criteria, you can filter results to see only those for your specialty
  - To filter results by information in a specific column or columns, click Filters on the toolbar. Then choose one or multiple columns to filter on, and specify values for each. Click Apply to filter your results.

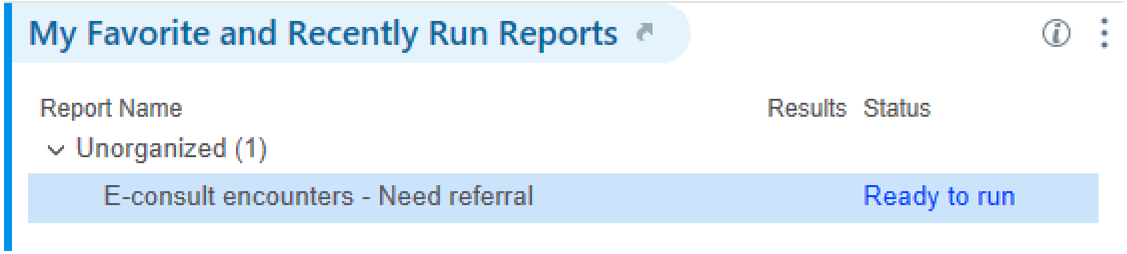


Adding as a favorite report

- Search for your new private report (see slide #3 – Open Report)
  - If you have not created a new private report, search for the system E-consult encounters – Need referral report



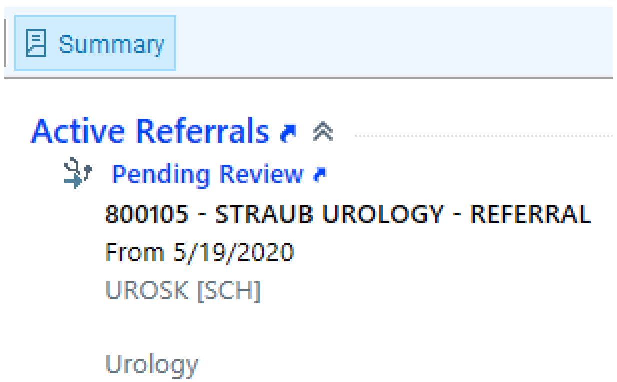
- Favorite reports will be available to run from the dashboard

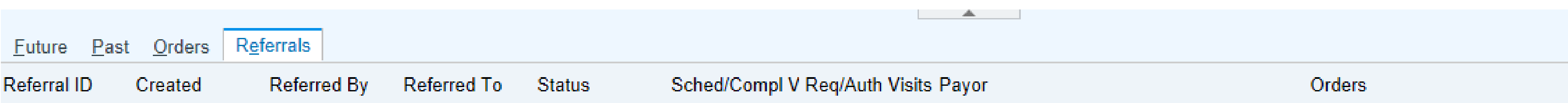


- Click on *Ready to run* to run report

Check Summary report to see recent referrals

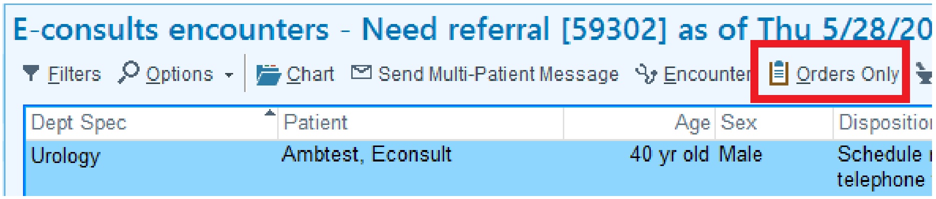
- Highlight a patient and click on the Summary report below to determine if a recent referral to your specialty has already been placed
  - *Note:* This will show 5 of the most recent referrals (including cancelled and closed). Click on the hyperlink to see the Referral tab in the Appt Desk



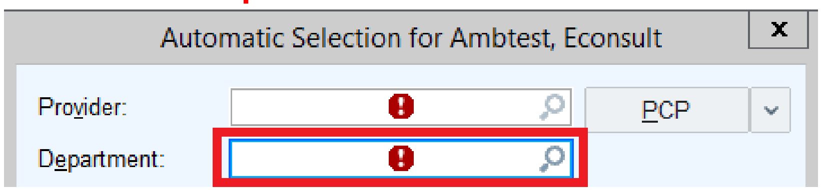


Creating *Orders Only* encounter

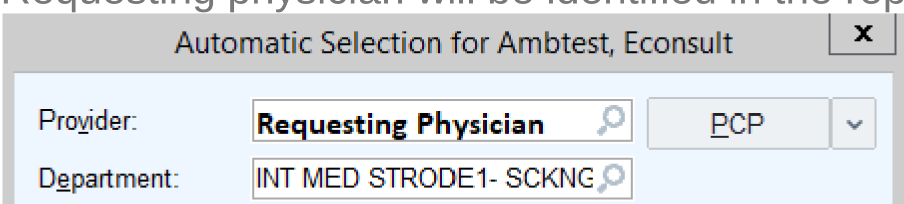
- Highlight patient and click on *Orders Only*



- Delete the department that was defaulted in the field



- Input name of the Requesting physician & correct department will automatically be pulled in.
  - Requesting physician will be identified in the report under referring provider



Place referral order and sign visit

- Place facility-based referral order
- The authorizing provider will be the Requesting physician
  - The Orders Only encounter provider is automatically pulled in as the authorizing provider
  - The Requesting physician will receive a Cosign order in-basket message for the referral