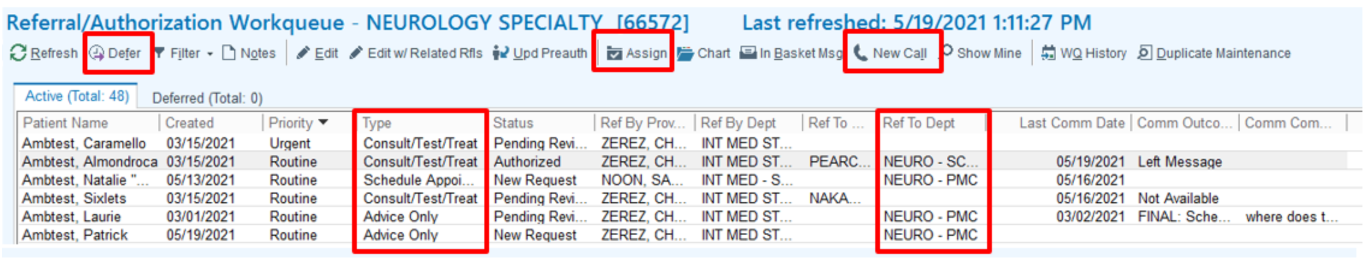
HAWAIʻI PACIFIC HEALTH | KAPIʻOLANI PALI MOMI STRAUB WILCOX

Referrals and E-Referrals Cheat Sheet
Consulting Providers and Departments

Referral / Authorization Workqueue (Staff)

1. Click the **Epic** button on the top left > **Referrals** > **Workqueue List**
2. Select the **Referral/Authorization** tab and double-click your department's workqueue

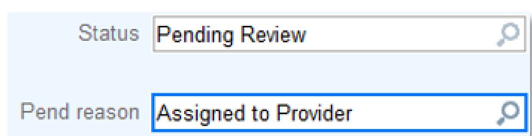


Patient Name	Created	Priority	Type	Status	Ref By Prov...	Ref By Dept	Ref To ...	Ref To Dept	Last Comm Date	Comm Outco...	Comm Com...
Ambtest, Caramello	03/15/2021	Urgent	Consult/Test/Treat	Pending Revi...	ZEREZ, CH...	INT MED ST...					
Ambtest, Almondroca	03/15/2021	Routine	Consult/Test/Treat	Authorized	ZEREZ, CH...	INT MED ST...	PEARC...	NEURO - SC...	05/19/2021	Left Message	
Ambtest, Natalie "...	05/13/2021	Routine	Schedule Appoi...	New Request	NOON, SA...	INT MED - S...		NEURO - PMC	05/16/2021		
Ambtest, Sixlets	03/15/2021	Routine	Consult/Test/Treat	Pending Revi...	ZEREZ, CH...	INT MED ST...	NAKA...		05/16/2021	Not Available	
Ambtest, Laurie	03/01/2021	Routine	Advice Only	Pending Revi...	ZEREZ, CH...	INT MED ST...		NEURO - PMC	03/02/2021	FINAL: Sche...	where does t...
Ambtest, Patrick	05/19/2021	Routine	Advice Only	New Request	ZEREZ, CH...	INT MED ST...		NEURO - PMC			

- **Defer** – moves referral to Deferred tab until a specific date / period of time
- **Assign** – used to schedule appointments from workqueue
- **New Call –** document incoming / outgoing call attempts.
- Click the **Type** and/or **Ref to Dep** column headers to sort your workqueue

Assigning Referrals to Providers (Staff)

1. Double-click referral in workqueue
2. **Status** = Pending Review
3. **Pend Reason** = Assigned to Provider
4. Type name of **Provider** to assign to in **Referred to** section
5. Click **Accept**

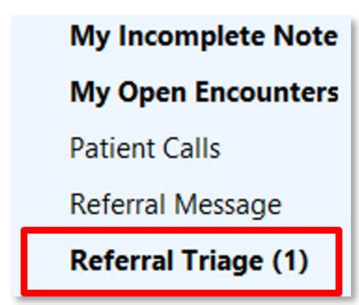


Reviewing Assigned Referrals (Providers)

Assigned referrals will appear in provider's In Basket > **Referral Triage** folder.

To respond / document recommendation:

1. Click message in **Referral Triage** folder
2. Click **Start E-Referral Response** button (top right)
3. **E-Referral Response Encounter** will be created

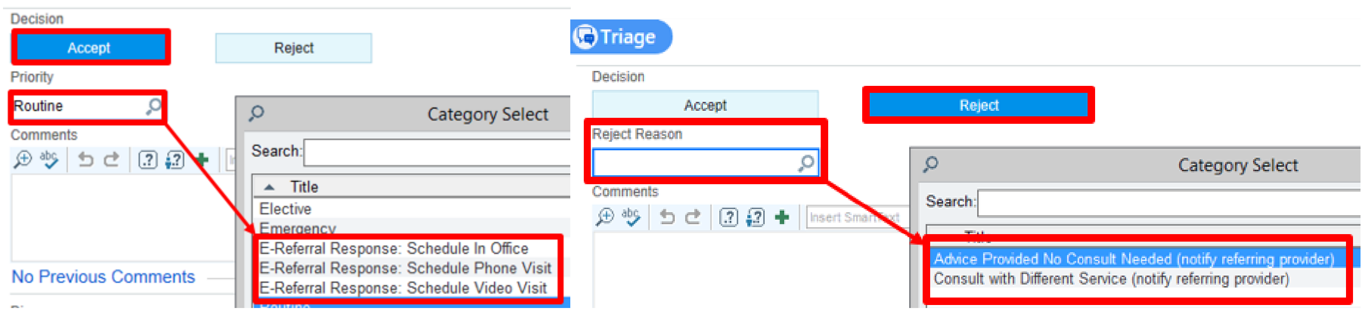


E-Referral Response Encounter has 6 sections to be updated.
Progress Note and Disposition are required.

1. **Order Info** – review details about the original referrals
2. **Progress Note** – type a note documenting your recommendation
3. **Disposition** – document time / minutes spent reviewing referral
4. **Triage** – select your recommendation (i.e. schedule a consult, advice provide, etc.)
5. **E-Referral Conversation** – type a message to the referring provider (i.e. question, recommendation)
6. **Routing** – send your Progress Note and/or E-Referral Conversation to a provider / recipient
7. Click **Sign Encounter** when complete

Triage Section (Providers)

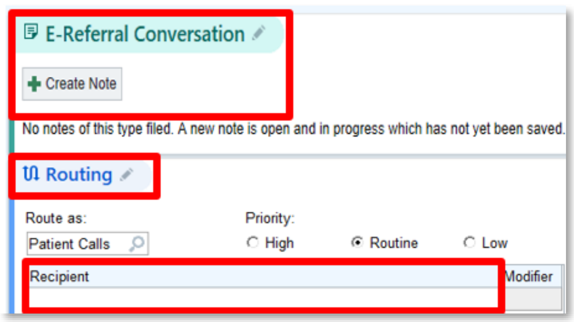
- **Accept** = Consultant recommends patient be seen by that specialty for consult
  - Click the magnifying glass under **Priority**
  - Choose any of the **E-Referral Responses** (i.e. Schedule In Office)
  - These will appear in your department's Referral / Authorization workqueue and be used to schedule patients accordingly
- **Reject** = Consultant advises consult not needed at this time or should be evaluated by another specialty
  - Click the magnifying class under **Reject Reason**
  - Select a reason (i.e. No Consult Needed, Consult w/Different Service)
  - Use **E-Referral Conversation** and/or **Routing** sections to notify referring provider



E-Referral Conversation and Routing Sections (Providers)

To send in basket messages to referring providers / others regarding the referral.
Messages will appear in In Basket > **Patient Calls** folder.

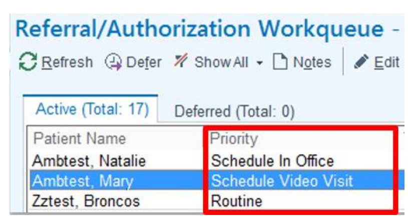
1. Click **Create Note** in E-Referral Conversation section
2. Type note
3. Type a **Recipient** in Routing section
4. Click **Close Workspace** to send message
5. To view responses from referring provider
   a. Go to **In Basket** > **Patient Calls** folder
   b. Click **Sort & Filter** icon > **E-Referral Response**



Viewing Consulting Provider Recommendations from Referral / Authorization Workqueue (Staff)

If consulting provider selects **Accept** in E-Referral Response Encounter

- Decision will appear in the Priority field in wq (i.e. Schedule In Office)
- Update prior auth info:
  - Double-click referral in wq, **Status = Authorized**
  - If auth required: update **Auth #** field
  - If no auth required: **Auth Reason = No Approval Necessary**
- Use **New Call** and **Assign** to document outreach and schedule appt



If provider selects **Reject** in encounter, referral will be automatically removed from wq at the end of the day

To manually remove referral from wq:

- Double-click referral in wq
- **Status = Closed** > select **Close reason** > click **Accept**

To add referral back to workqueue

- Access **Appt Desk** for patient
- Click the **Referrals** tab > right-click referral > **Edit Referral**
- **Status** = **New Request**