



CERNER FLASH

Ambulatory - New External Referral Workflow

Thursday August 20th, 2020

External Referral Workflow Changes

Effective August 26th, there will be a new process for processing External Referrals.

- An online module explaining this new process is available on [PromisePoint](#) by searching for course 6060.

External referrals are referral orders placed to providers that are not using the OneMcLaren Cerner system. When a provider places orders an External Referral order, the referral order will generate two tasks to the Multi-Patient Task List:

- Referral Workup:** The first task generated is a Referral Workup, which displays on the New Referrals tab. This task is used as notification that an external referral is needed. The task is completed when the appointment is scheduled.
- Referral Documentation/Results Received:** The second task generated is a Referral Documentation/Results Received, which displays on the Pending Referral Notes tab. This task will remain on the task list for tracking, and is completed once the referral consult is received.

Workflow Changes Overview

Previous Steps:	New Steps:	Reason for Change:
There was one tab on the Task List for referrals. <ul style="list-style-type: none"> Referrals 	There are two tabs on the Task List for referrals. <ul style="list-style-type: none"> New Referrals Pending Referral Notes 	<ul style="list-style-type: none"> To help differentiate between referrals that need to be scheduled vs. referrals that are pending receipt of consult letter. Improve Task List response/performance.
One task generated when External Referral was ordered. <ul style="list-style-type: none"> Referral Documentation/Results Received 	Two tasks will generate when External Referral is ordered. <ul style="list-style-type: none"> Referral Workup Referral Documentation/Results Received 	<ul style="list-style-type: none"> To help differentiate between referrals that need to be scheduled vs. referrals that are pending receipt of consult letter. To help create a more efficient way to 'close the loop' for referrals.
The task had a Powerform attached, for staff to document appointment details.	No Powerform will be associated with the task. Instead, the External Referral order is modified, and appointment details are added to the order.	After updating the order, the Order Details column on the task list will contain the appointment scheduling information. The Appt Date is the first data element in this column, allowing staff to sort to see which referrals are occurring next. This will help with efficiency in order tracking, since staff will not have to waste time looking at referrals with appointment dates that have not yet occurred.



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New External Referral Steps

Locate Referral Workup Task

- 1) Navigate to the **Multi-Patient Task List**.
- 2) Locate the **Referral Workup** task on the **New Referrals** tab.
- 3) View the details in the **Order Details** column (i.e. specialty, reason for referral, and name of provider/clinic patient is being referred to, if listed). These details will be used to gather the data needed to generate a Provider Letter and schedule the appointment.
 - **Note:** *There is no form associated with this task, the task is for tracking purposes only.*

New Referrals		Pending Referral Notes	Prior Authorization	Office/Clinic Task			
Task retrieval completed							
<input checked="" type="checkbox"/> All Patients	Name	Medical Record Number	Location	Mnemonic	Task Description	Task Status	Order Details
<input checked="" type="checkbox"/> BREAKAWAY, MARIA	MMGTRAIN, TIANA	310001779036	LN43 Okemos FM	External R...	Referral Workup	Pending	05/08/20 15:32:00 EDT, Allergy and Immu
<input checked="" type="checkbox"/> MMGTRAIN, TIANA	ZZTEST, BRENDA	310001778998	LN43 Okemos FM	External R...	Referral Workup	Pending	05/08/20 15:29:00 EDT, Endocrinology, D
<input checked="" type="checkbox"/> MMGTRAIN, TIANA	MMGTRAIN, TIANA	310001779036	LN43 Okemos FM	External R...	Referral Workup	Overdue	04/30/20 11:50:00 EDT, Allergy and Immu

Schedule Appointment

- 1) Call the receiving office to schedule the appointment.
- 2) If the patient is scheduling their own appointment, provide them with a copy of the referral requisition.
 - **Note:** *Refer to the "Referral Follow-Up" section for instructions on how to log details of patient outreach.*

Generate Provider Letter

- 1) From the **Referral Workup** task, right-click and choose **Open Chart**.
- 2) Generate the Provider Letter for the specialist by following the Provider Letter workflow and attaching any supporting documentation, such as office visit notes or results.

Modify Order & Complete Referral Workup Task

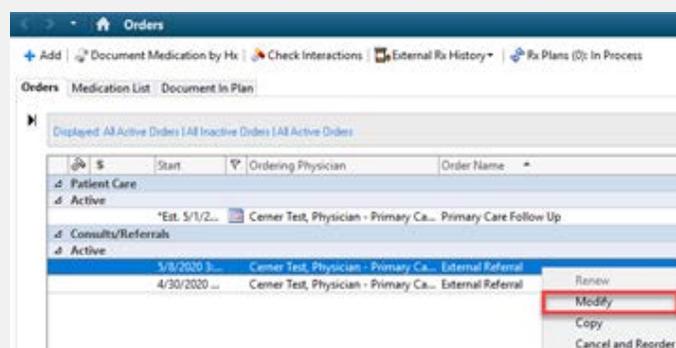
A key component of the external referral tracking process is to Modify the External Referral order to include the necessary referral scheduling information, including the following data points:

- Referral Appointment Date
- Referring Provider Name
- Date Materials Sent
- Date Patient Informed of Appt

Adding the appointment details to the referral order will assist staff with prioritizing the Referral Worklist. Reports can also be pulled that contain this information since it is logged on the order itself.

1) Navigate to the **Orders** tab and select the **External Referral** order.

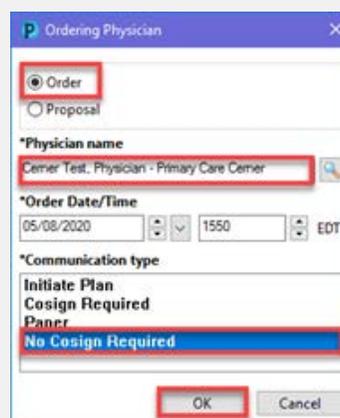
- a. Right-click on the order and choose **Modify**.



2) In the **Ordering Physician** window:

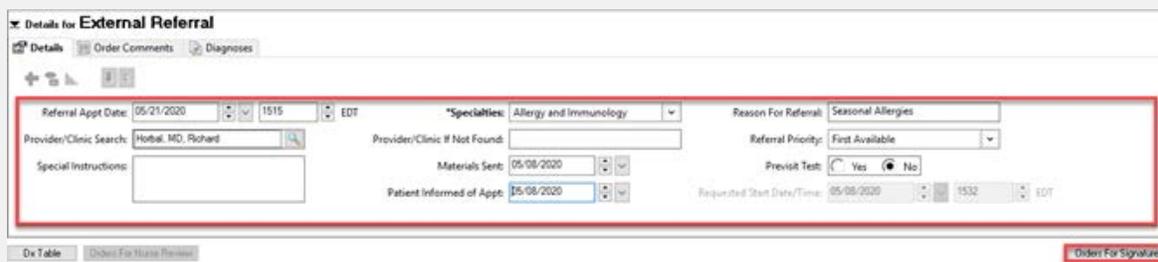
- a. Select the **Order** radio button.
- b. **Physician name:** Enter the ordering providers name.
- c. **Communication type:** Select **No Cosign Required**.

3) Click **OK**.



Modify Order & Complete Referral Workup Task cont.

- Complete the details for the referral appointment.
 - Note:** Entering these order details is an essential part of this workflow, particularly the Referral Appointment Date.
- Click **Orders for Signature** and then click **Sign**.



Details for **External Referral**

Referral Appt Date: 05/21/2020 1515 EDT *Specialties: Allergy and Immunology Reason For Referral: Seasonal Allergies

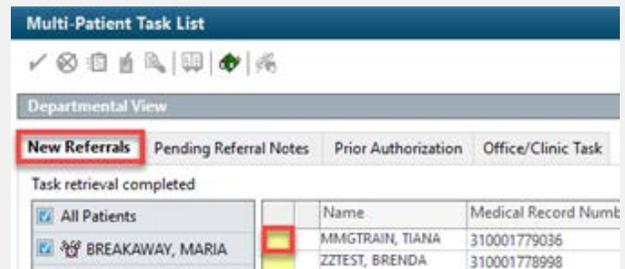
Provider/Clinic Search: Hobel, MD, Richard Provider/Clinic If Not Found: Referral Priority: First Available

Special Instructions: Materials Sent: 05/08/2020 Previsit Test: Yes No

Patient Informed of Appt: 05/08/2020 Requested Start Date/Time: 05/08/2020 1532 EDT

Order For Signature

- Return to the **Multi Patient Task List** to complete the **Referral Workup** task. Click in the **yellow box** next to the task.



Multi-Patient Task List

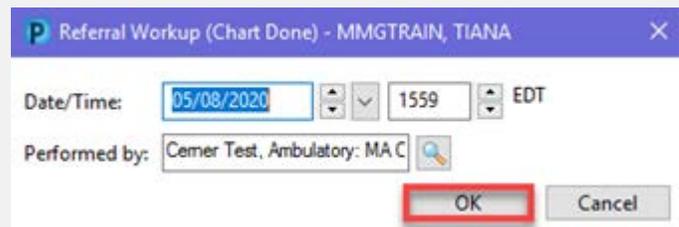
Departmental View

New Referrals Pending Referral Notes Prior Authorization Office/Clinic Task

Task retrieval completed

	Name	Medical Record Num
<input checked="" type="checkbox"/>	MMGTRAIN, TIANA	310001779036
<input checked="" type="checkbox"/>	BREAKAWAY, MARIA	310001778998

- Click **OK** in the Chart Done window.
 - Note:** The Date/Time field can be adjusted if needed.



Referral Workup (Chart Done) - MMGTRAIN, TIANA

Date/Time: 05/08/2020 1559 EDT

Performed by: Cerner Test, Ambulatory: MA C

OK Cancel

- The **Referral Workup** task will now display as complete.

	Name	Medical Record Number	Location	Provider Name	Mnemonic	Task Description	Task Status
<input checked="" type="checkbox"/>	MMGTRAIN, TIANA	310001779036	LN43 Okemos FM	Cerner Test, Physician	External R...	Referral Workup	Complete



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Close Referral Loop: Scan Consult/Complete Referral Documentation Task

After the patient attends their appointment and the consult letter is received at the referring office, the consult letter will be scanned into the chart. The staff member who scans in the documentation will also complete the **Referral Documentation/ Results Received** task. This is to assure the referral loop is closed efficiently.

- 1) From the Multi Patient Task List, select the **Pending Referral Notes** tab.
 - a. **Click** the column headings to sort the **Referral Documentation/Results Received** tasks.
 - **Note:** *Sorting the **Order Details** column to view the tasks by appointment date will allow staff to focus on completing tasks for appointments that have already occurred, therefore time will not be wasted on appointments with future dates.*

The first date in the Order Details column will be the Appt Date.

Order Details
01/02/20 12:12:00 EST, Bariatric Surgery, Stomach pain
01/09/20 12:12:00 EST, Bariatric Surgery, Pain aggravated by breathing
01/10/20 11:11:00 EST, Care Management, Acute chest pain
01/13/20 10:19:00 EST, arm pain, Kurdi, DO, Ramy M, kurdi, left arm pain / di...

- 2) Once the consult is scanned into the chart, mark the **Referral Documentation/Results Received** task on **Pending Notes Received** tab done by clicking in the **yellow box** next to the task.
 - a. Click **OK** in **Chart Done** window.
 - b. The task will now display as complete.

	DONOTUSE, CLINICALONE 310001715288	LN45 Holt FM Cerner Test, Physician - Primary Care Two Cerner	External Referral Ref
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Following Up on Outstanding Referrals

Scenario 1: Patient Outreach

- 1) If patient opted to schedule the appointment, document each attempt to contact them via an Admin Note on the **Referral Workup** task.
 - a. Right-click on task and choose **Create Admin Note**.
 - b. In the **comments** field, document your attempt to call the patient and include the date of call and name of staff member, then click **OK**.

A **paperclip icon** will display next to the task indicating there are comments associated to this task.
- 2) Continue to document all patient outreach attempts on the existing **Admin Note**. This can be done by selecting the paperclip icon, then entering additional comments.

Note: Do not delete the text from previous outreach attempts. Continue typing below the existing text.
- 3) If contact with the patient is successful:
 - a. Take note of the patient's appointment date and follow the External Referral workflow as described above.
- 4) If contact with the patient is unsuccessful:
 - a. Create a new message in **Message Center** using the contents from the **Admin Note**. Send to the ordering provider as an FYI that the patient was not seen for the referral they ordered. The message will also be saved to the patient's chart as documentation that multiple communication attempts were made.
 - b. Complete **both** the **Referral Workup** and the **Referral Documentation/Results Received** tasks on the **Multi Patient Task List**.



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Following Up on Outstanding Referrals cont.

Scenario 2: Verifying Receipt of Consult Letter

Continual monitoring of the **Pending Referral Notes** tab of the task list is critical to ensure closure of the referral loop. Sort the **Order Details** column by Appointment Date, and follow-up with the performing facility if the appointment date has passed but the consult letter has not been received. If needed, follow the steps below to doublecheck the chart to see if the consult letter has been scanned in.

1) Navigate to **Documents** or **Notes** tab (whichever is preferred).

***Note:** Personal document filters can be created within the **Documents** tab, to allow filtering of documents by type, making it easier to locate specific documents. If interested in creating personal document filters, refer to the “User Customizations” guide or contact mmgcernertraining@mclaren.org for assistance.*

2) Review documents to see if consult letter has been scanned in.

3) If consult letter is found, complete the **Referral Documentation/Results Received** task.

4) If consult letter is not found, follow up with the performing office.

- **Note:** Follow the steps outlined in Scenario 1 to create an Admin Note to document that contact was made.

Referral Reporting

Various reports can be run from Cerner to obtain a list of referrals being sent out from the clinic.

- **Referral Tracking Report:** This can be run from the **Discern Reporting Portal**. This report contains data such as the Ordering Provider, Order Date, Referred to Provider, Specialty, and Special Instructions.
- **Outstanding Task Report:** This can also be run from the **Discern Reporting Portal**. Unlike the Referral Tracking Report, this report shows pending tasks and can be filtered to show only referrals
- **The Dynamic Worklist:** This can be used to create a running list of outstanding referral orders for a clinic and/or provider.