

Factor 8: Tracks referrals until the consultant or specialist’s report is available, flagging and following up on overdue reports.

Once the referral is initially processed and necessary clinical information has been delivered to the specialist, the referral clerk marks the “Referral Needed” task as completed and then creates another “Confirm Outcome” task assigned to themselves.

This new task should include a note indicating the required timing for receiving the report and will remain open and “not completed” until a response or report has been received from the specialist.

Edit Order - Referral Orders Heather Dile 5 years 3/26/09 F

Audiology Ordered

Note: needs further hearing tests ASAP

Signature Required Canceled Include on Patient Reports

Initial task marked as completed once

TASK Referral Needed appointment scheduled and clinical information sent to specialist. TO Referral

NOTE scheduled visit w/ Dr. Johnson audiologist for Fri 4/11 at 10:30am.

Task Completed AT 04/08/14 9:20am BY Referral

TASK Confirm Outcome TO Referral

NOTE report expected by 4/16

Task Completed AT mmm/dd/... 12:00am BY enter user name

New task created to confirm outcome later w/ required timing for receiving report

Back on the “Visit Tasks” queue, the referral clerk can filter the list of relevant referral tasks to include only non-completed referrals with a task status of “Confirm Outcome”. This allows them to see the referrals they need to check back on to confirm the outcome:

PCC EHR

Schedule (4) **Visit Tasks (2)** E-lab Results (29) Messaging (4) Signing (99+)

Counter of referral tasks based on filtered criteria below

Tasks: 2

Completed	Date	Patient	Visit Status (Rm.)	Provider	Order	Task	To
	04/08/14 09:07am	Heather Dile	Arrived	Dr. Jones	Audiology	Confirm Outcome Referral	
	04/07/14 04:25pm	Dino Flintstone	Arrived	Dr. Davidson	Occupational Therapy	Confirm Outcome Referral	

Filtered to include only referrals w/ task status "Confirm Outcome". These will need to be followed up on later.

Filtered to include only "Not Completed" referrals

Task: Confirm Outcome Location: All Locations Display: Not Completed

Assigned User: All Users Provider: All Providers Save My Defaults

Following up to obtain a specialist's report.

As described in the screen shot above, the referral clerk would monitor the visit tasks queue for referrals with the status of "Confirm Outcome". If it is past the expected timing for receiving the report the referral clerk would follow up with the specialist and/or patient to ask about the outcome. This effort is documented in the referral task list as shown in the following screen shot:

Edit Order - Referral Orders

Dino Flintstone 4 yrs, 2 mos 1/15/10 M

Occupational Therapy

Ordered

Note: concerns about probable autism. Refer to PDC

Signature Required Canceled Include on Patient Reports

TASK Referral Needed TO Referral

NOTE Wilma wanted to contact PDC herself...gave info and will check back in a couple weeks

Task Completed AT 04/08/14 8:25am BY PCC PCC

TASK Confirm Outcome TO Referral

NOTE checked in w/ Wilma to see if she has visited PDC. Wilma says they have a visit scheduled on 4/21. Will check back after that.

Task Completed AT 04/08/14 11:34am BY PCC PCC

Referral clerk adds note indicating they followed up. This task is marked as completed and a new task is opened to follow up again later.

TASK Confirm Outcome TO Referral

NOTE enter task notes here

Task Completed AT mm/dd/... 12:00am BY enter user name

Once a report has been received from the specialist, it can be scanned and imported into the patient's medical record, attached to the relevant referral. By assigning a provider to the "Needs to be signed by" field, the provider will be informed of the incoming report on their signing queue.

Import Documents

Heather Dile 5 years 3/26/09 F

File Selection

Filename	Date / Time
000152...	04/02/14 11:21am
000151...	04/02/14 11:21am
000151...	04/02/14 11:21am
000151...	04/02/14 11:21am
000151...	04/02/14 11:21am
000151...	04/02/14 11:21am
000151...	04/02/14 11:21am
000151...	04/02/14 11:21am

File Source: All File Sources

Remove Load New Files

Preview

PLEASE BE AS ACCURATE AND COMPLETE WITH YOUR RESPONSES AS POSSIBLE.

Today's date: 6-16-09

The scanned report is imported into the patient chart, attached to the relevant visit and referral

The document should be reviewed and signed by Dr. Jones

A general text note can be added describing the document

File 1 of 1 Selected

00015220090708_0823070001.jpg 04/02/14 11:21am

Rotate Full Screen Previous Next

Tags

Category: Visit Note

Attach Document

04/08/14, 4-5 Years Well V2.0

Referral - Audiology

select an order

File as Unattached Document

Document Date:

Display in the Visit History Index

Needs to be Signed by Provider: Fred Jones, M.D.

Note

Report from audiologist Dr. Johnson.

Cancel Save

Once the report from the specialist has been reviewed by the provider, he/she would sign the report and advise the clinical staff if any further action or communication is to occur.