**SKILL SHARPENER ACTIVITY**
CST Enterprise Clinical Informatics

# Referral Management and Triage

Last Update: April 25, 2022

# Referral Triage

| Learning Objectives |
| --- |
| At the end of this Scenario, you will be able to:<br>- Overview Referral Management<br>- Set up Referral Management<br>- Access a Patient Chart from Referral Management<br>- Communicate to Triage Provider from Referral Management |

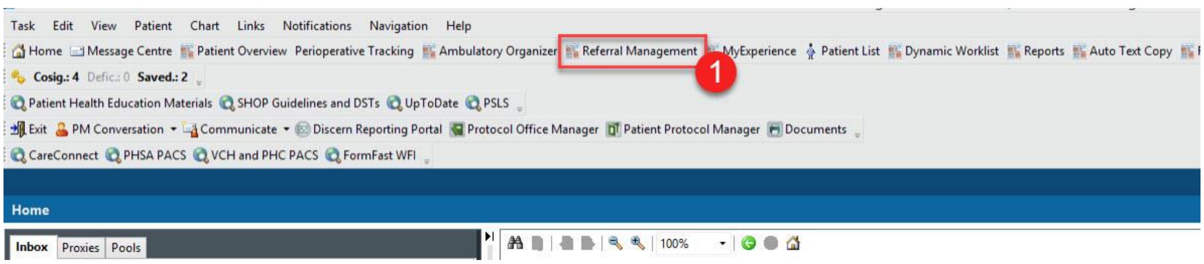
| OVERVIEW |
| --- |
| As a Complex Pain Nurse, you will complete the following activities:<br>- Section 2.1 – Set up Referral Management<br>- Section 2.2 – Access a Patient Chart from Referral Management<br>- Section 2.3 – Add Communication notes for the Triage Provider |

# Set up Referral Management

The first time you access **Referral Management** tool it will not be populated. You will be presented with a message that says Required Prompts Must Be Completed to Continue. You will need to customize and save multiple lists you will be managing.

## Set Up Referral Management Triage List

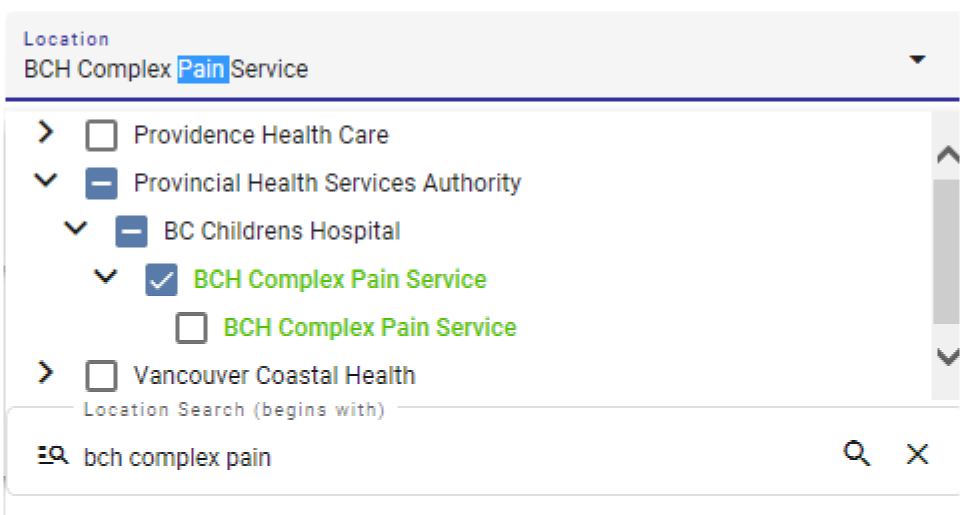
1. Click **Referral Management** tool on the grey toolbar.




2. Enter the parameters for your list:

   a. **Location:** You can search for your location by typing in keywords in the **Location Search** field. For example, type: *BCH Complex Pain Service*

   **NOTE:** Matching search results will display in green




   b. **Referral Status:** *Ready for Screening*

   c. **Medical Service:** leave blank

   d. **Tumor Group**: leave blank

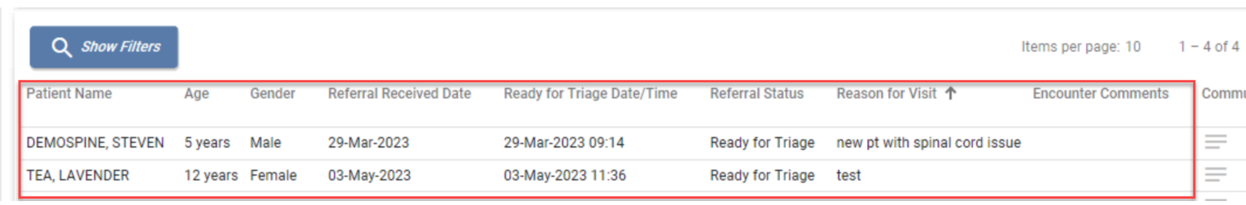
e. **Triaging Priority:** leave blank

f. **Attending Provider:** leave blank

3. Click Run to execute the list after selecting all the desired parameters.

A list with the names of patients with **Referral Encounters** that meet the requested criteria will be displayed.

**NOTE:** Screenshot is for training purposes only. You may not be able to view this in the train environment


Show Filters

Items per page: 10 1 – 4 of 4

| Patient Name | Age | Gender | Referral Received Date | Ready for Triage Date/Time | Referral Status | Reason for Visit | Encounter Comments | Commu |
|---|---|---|---|---|---|---|---|---|
| DEMOSPINE, STEVEN | 5 years | Male | 29-Mar-2023 | 29-Mar-2023 09:14 | Ready for Triage | new pt with spinal cord issue | | |
| TEA, LAVENDER | 12 years | Female | 03-May-2023 | 03-May-2023 11:36 | Ready for Triage | test | | |

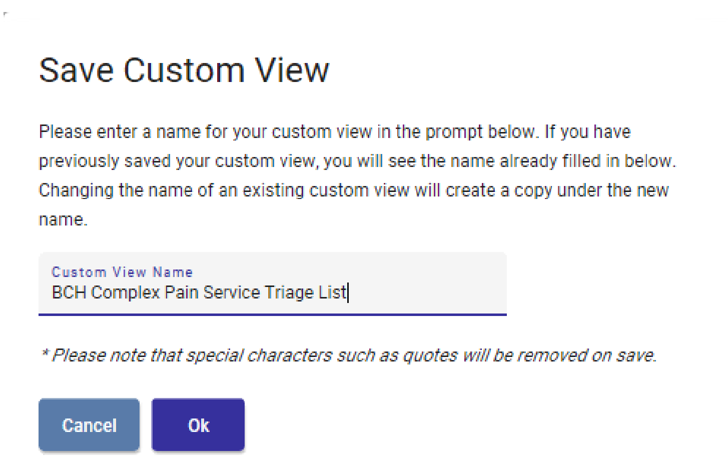
## *Save a Custom List*

4. After you have set up your referral management triage list you can save it by clicking the **Save** icon .

5. Enter the name for your list (*e.g. BCH Complex Pain Service Triage List*)

6. Click **OK.**

Your saved list appears under **Saved Views**.



> **NOTE**: The next time that you log into PowerChart and open **Referral Management** it will default to the **Last Run** list. Do not click the **Last Run** option. You should either run off your saved lists or select new parameters to execute a new list.

## *Customize the Order of Columns*

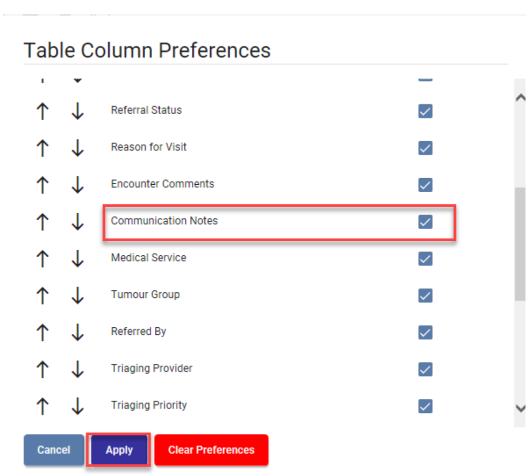
The list contains columns with information that can help in the triage process. You can also access a patient's chart, from the list, by clicking on the patient's name.

7. You can customize the columns on your list by clicking the Settings Icon .

> **NOTE**: If the **Saved View(s)** section says Last Run, you must select the list you want to edit to see the Settings icon.

The **Table Column Preference** window opens.

8. Click the **Up** and **Down** **arrows** to change the order of the columns (*e.g. Communication Notes*)
9. Uncheck or place a **checkmark** beside the columns you wish to display.
10. Click **Apply** to save the settings.



# Access a Patient Chart from Referral Management

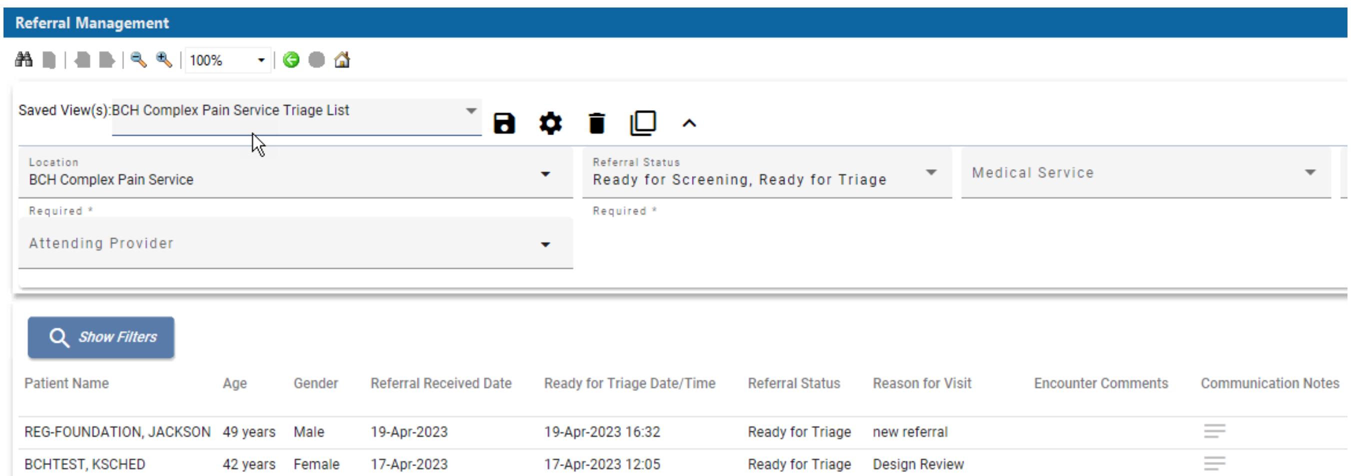
To ensure that the correct patient encounter is selected, when accessing a patient's chart for referral triage, it is recommended to open the chart from a **Referral Management** list.

A patient's chart can be accessed directly from the list of patients created using Referral Management.

## Access a Patient Chart from Referral Management

1. Select the Referral Triage Patient List from the drop down arrow in **Saved View(s)**.

2. Click on the patient's name to access their chart.




Within **PowerChart**, Providers and Clinicians in Ambulatory settings have access to the **Referral Triage** Workflow tab to assist them with the referral process.

This tab is used to:

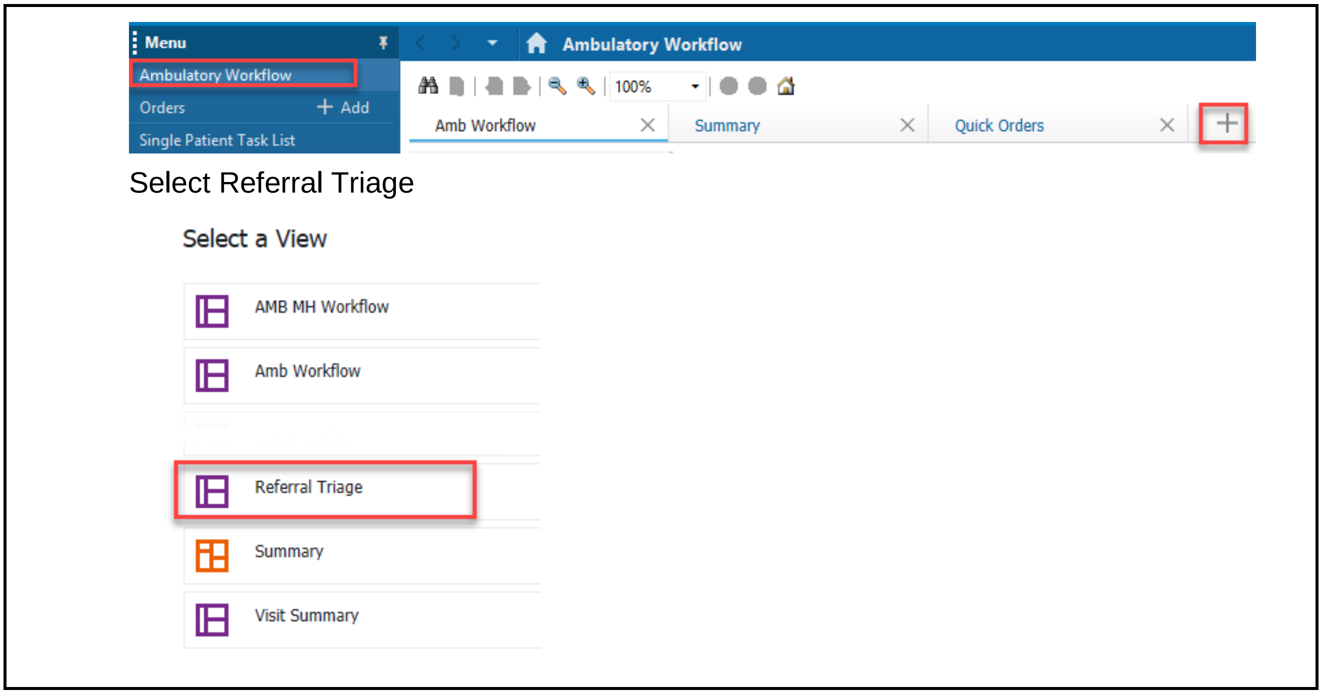
a. Review relevant labs, clinical history, CareConnect etc.

b. Select common orders to manage referral

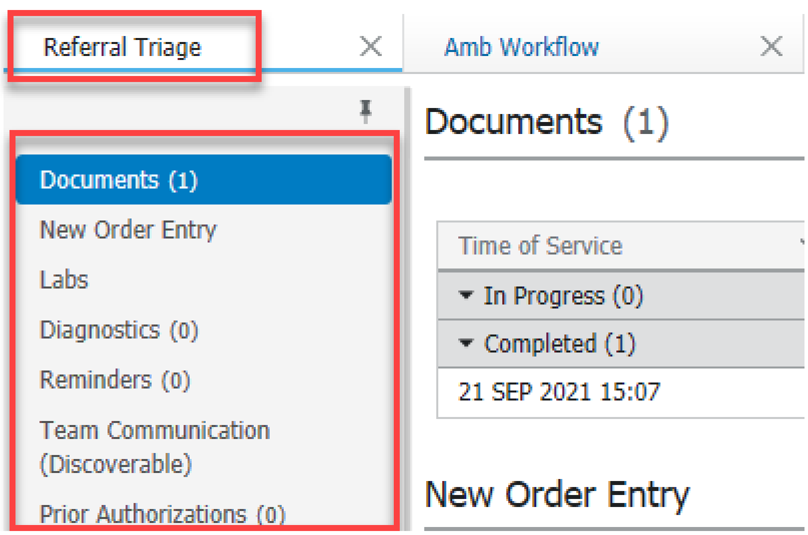
11. Select **Ambulatory Workflow** under the Menu. Or just click the home icon.

12. Select the **Referral Triage** Workflow tab.

**NOTE**: If you are missing the **Referral Triage** Workflow tab in **Ambulatory Workflow** View, you can add this tab by clicking the Plus icon. Consider expanding your screen to view all available tabs.




3. Review the different components in **Referral Triage**. (Documents, New Order Entry, Labs, Diagnostics etc.) to gather information about the referred patient.



# Add a Communication Note

## Add a Communication Note

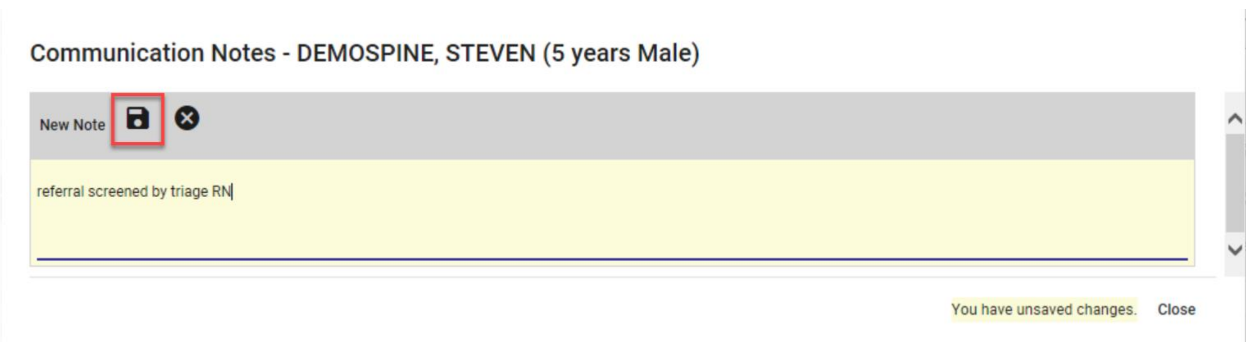
To make it easier for providers and clinicians to communicate regarding patients to be triaged, add a note in the Communication Notes column to indicate screening by the triage nurse is complete.

1. Once content is loaded in Referral Management, use the scroll bar to locate the **Communication Notes** column.

2. Click the **Notes** icon to open the **Communication Notes** window.

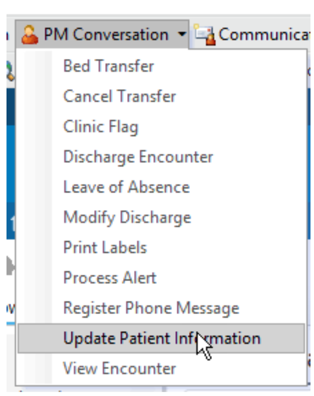
3. Click into the **New Note** box and type a free text communication note (e.g. *referral screened by triage RN).*

4. Click the **Save** icon.




# Changing Referral Status

Once you are finished with your referral intake, navigate to PM conversation in your toolbar and select update patient information.



Under the referral info tab, change the referral status to Ready for Triage. Now the provider will have access to the patients that need to be triaged in referral management.