

## Allscripts Referral Tracking

### Part One: Working the Referral

1. Locate and single click the referral on the Referral Worklist. *The order can be expanded by clicking the plus sign if you would like to view additional details before opening it. (Figure 1 & 2)*
2. Click Edit from the gray menu bar. *(Figure 2)*
3. While in the Edit view, (a) search for and enter the recipient in the Recipient field and (b) enter any scheduling notes in the For Scheduler field. *(Figure 3)*
4. Change the Status to Temporary Deferral. Click Details and choose either Report Pending or Appointment Pending. Click OK and then OK again. *(Figure 4)*
5. If you leave the "Defer for # of Days" at 0, the order would stay on your Tracker Worklist. So you will be able to keep your worked items separated onto your Tracker worklist until it is time to resolve them by just working from oldest date.
6. When the appointment has been scheduled, change the To Be Done date to the scheduled date.
7. The order will be highlighted in magenta. Click the yellow Commit button. *The order will be italicized on this screen, indicating it has been moved to another view. (Figure 5)*

At this point the referral has been processed and is waiting on something to come back, either the appointment time or report, etc. You have moved the referral off of your worklist to the tracker in order to organize your referrals into two categories: (1) Needs to be "worked" [Referral Worklist] and (2) Waiting for information [Referral Tracker]

### Part Two: Completing the Referral

8. Locate and right click the order on the Referral Tracker. Click Stop Deferral. *(Figure 6 & 7)*
9. Click the yellow Commit button. *The order will be italicized on this screen, indicating it has been moved to another view.*
10. Locate the order on the Referral Worklist. Choose Completed On or Completed Today. Commit. *(Figure 8)*
11. Right click on the order again, and Click Edit. Then Click the Specialist Response Received check box. Ok and Commit. *(Figure 9)*

Figure 1

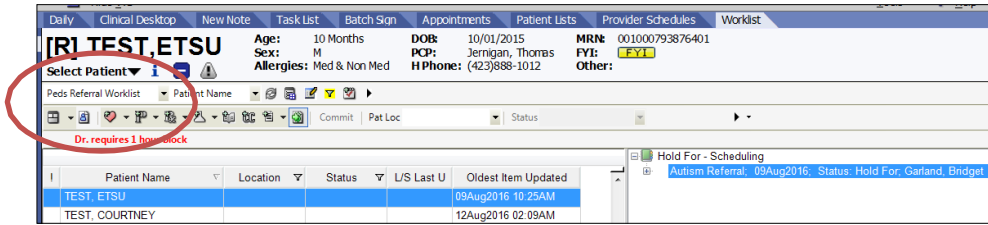


Figure 2

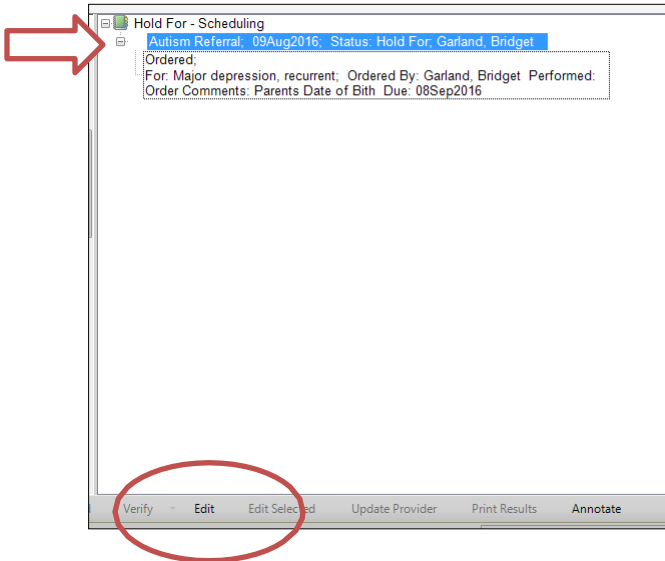


Figure 3

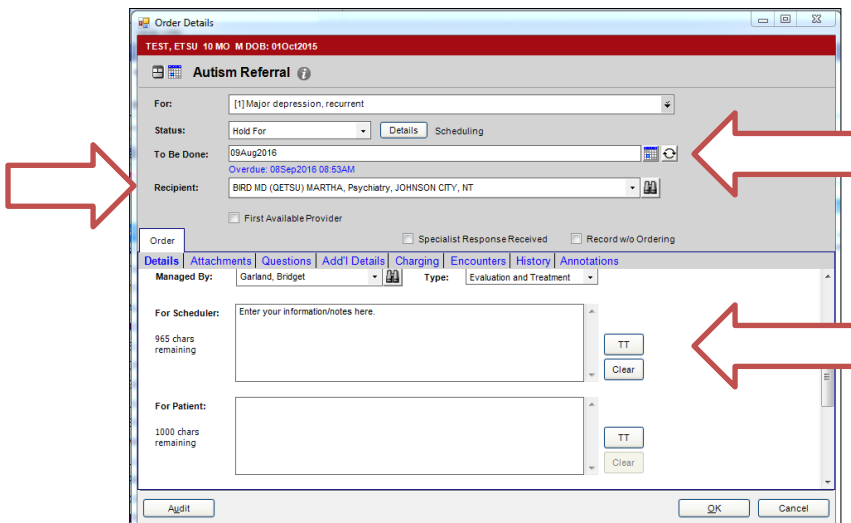


Figure 4

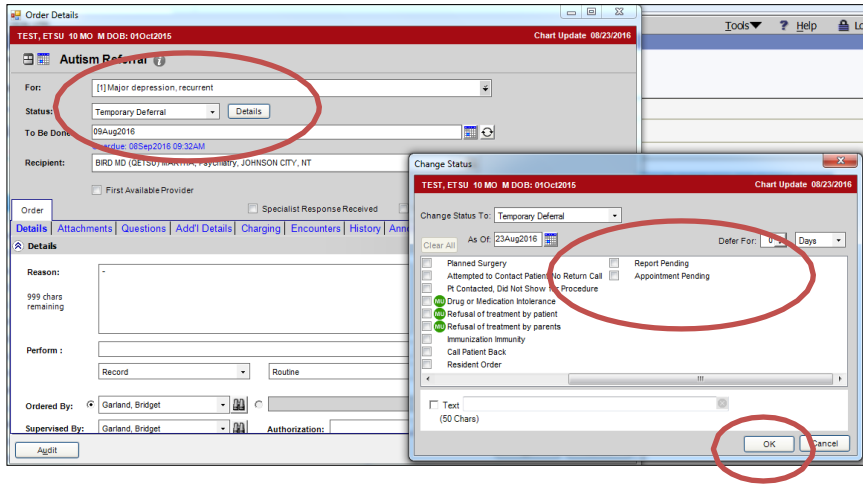


Figure 5

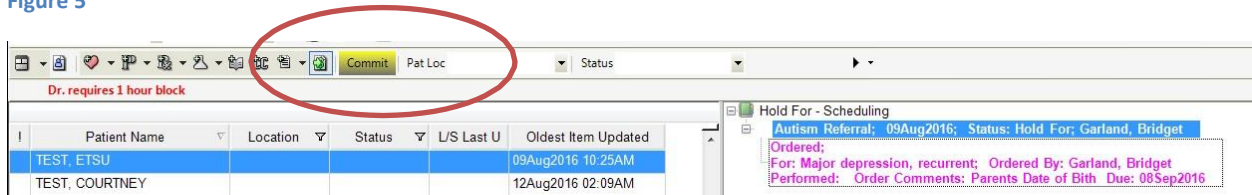


Figure 6

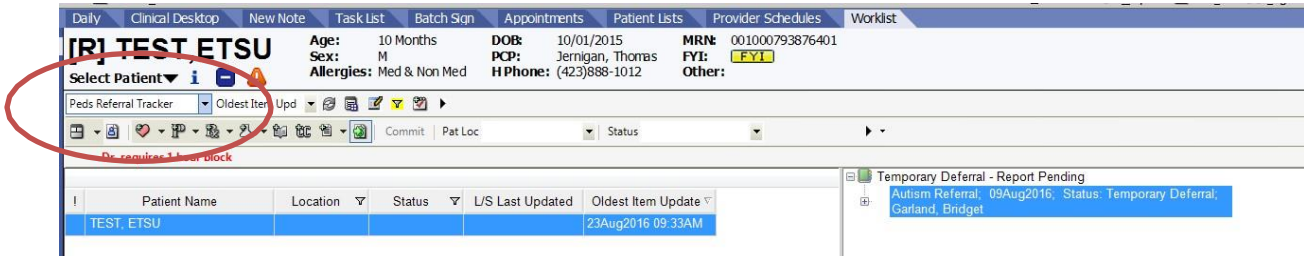


Figure 7

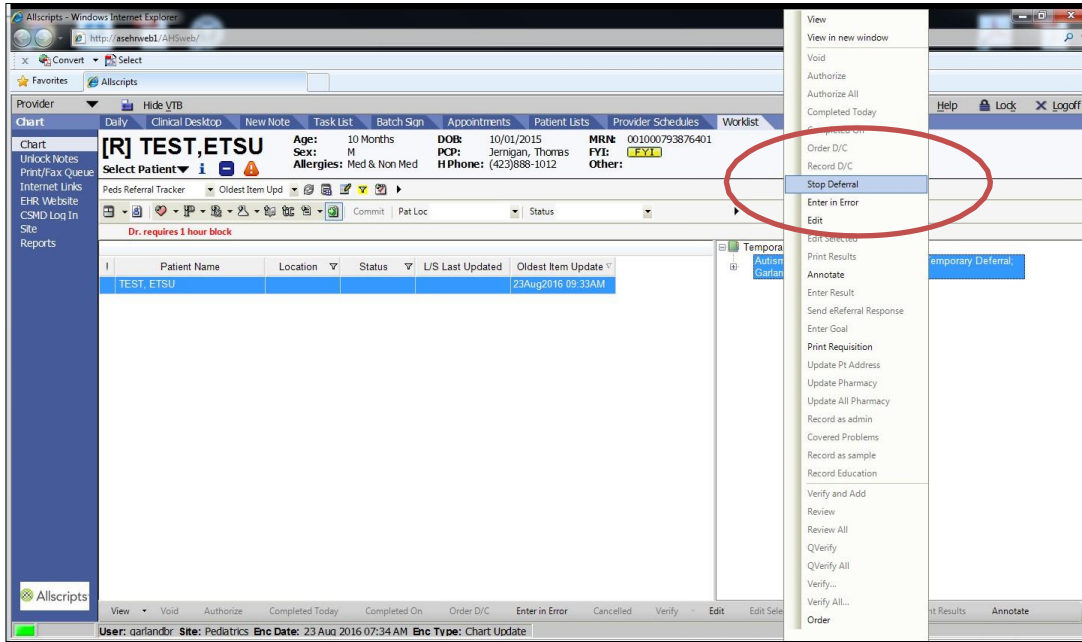


Figure 8

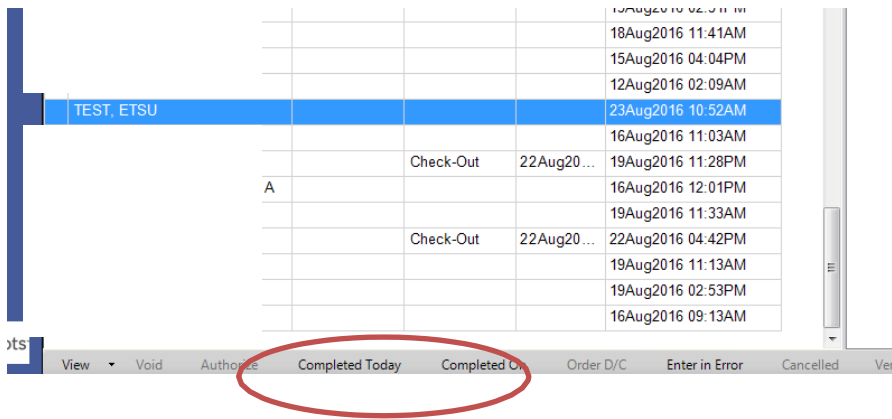


Figure 9

