Allscripts Referral Tracking-Internal Medicine

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. When the appointment has been scheduled, change the To Be Done date to the scheduled date, exact date and time. It is required to use the calendar and clock function.
5. Change the Status to Temporary Deferral. *(Figure 4)*
6. Leave the "Defer for # of Days" at 0, to move it off the Hold for Scheduling Worklist and onto the Tracker worklist that the Office Administrator can see.
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)*

Part Two: Completing the Referral

8. The clinical staff will continue to follow up on referrals when an Overdue Order is created.
9. Look in the Clinical Desktop for a report. If no report, contact patient or referred to provider, If report is received, Locate the referral under All Orders, Status-Temporary Deferral.
10. Locate and right click the order and Click Stop Deferral. *(Figure 6 & 7)*
11. Click the yellow Commit button. *The order will be italicized on this screen, indicating it has been moved to another view.*
12. Locate the order again under All Orders, but it will now be Hold for Scheduling Status again. Choose Completed On or Completed Today. Commit. *(Figure 8)*
13. Right click on the order again, and Click Edit. Then Click the Specialist Response Received check box. Ok and Commit. *(Figure 9)*

Figure 1

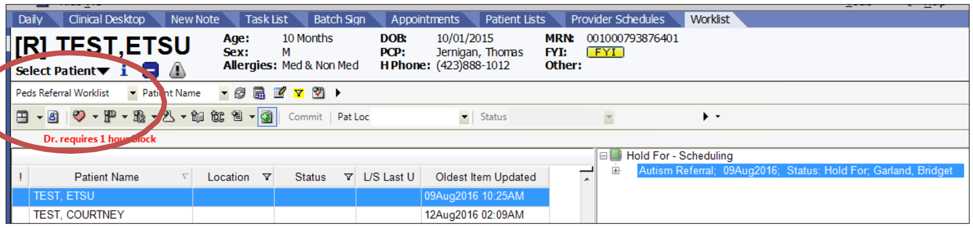

Figure 2

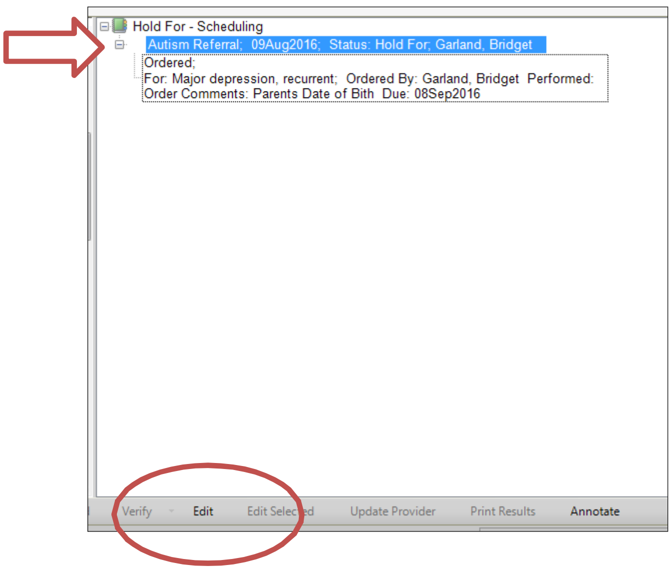

Figure 3

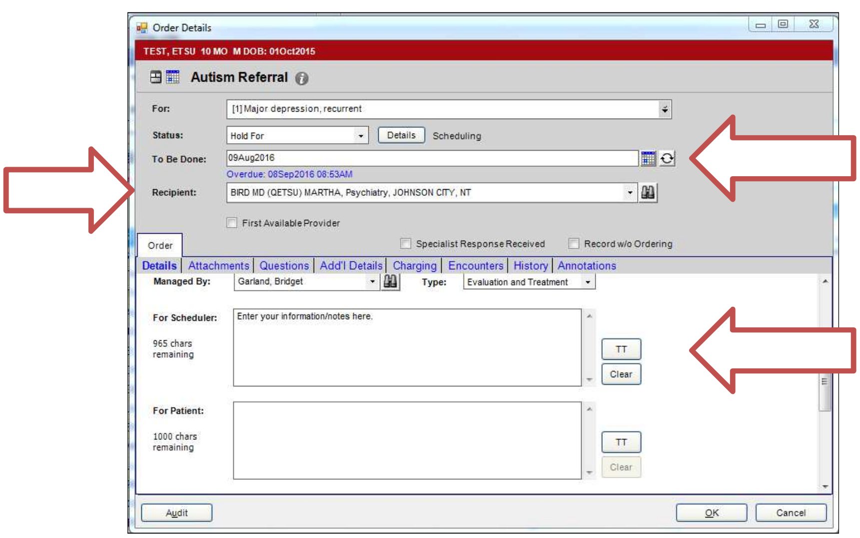

Figure 4

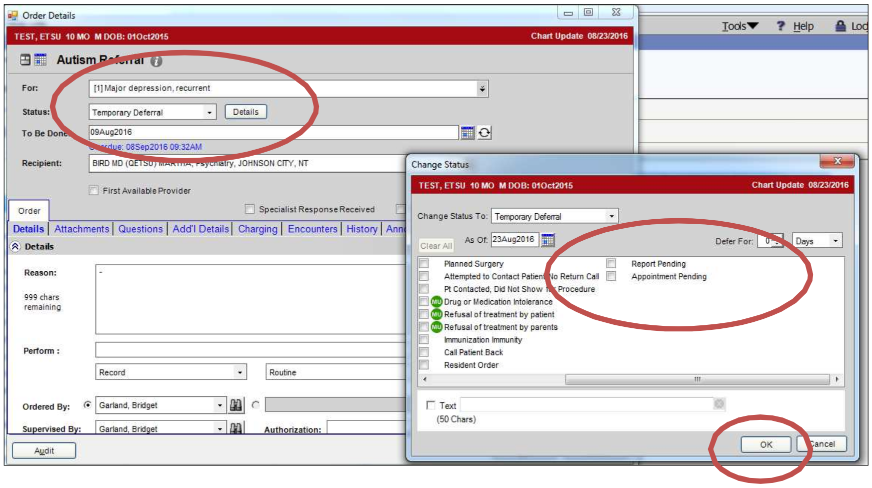

Figure 5

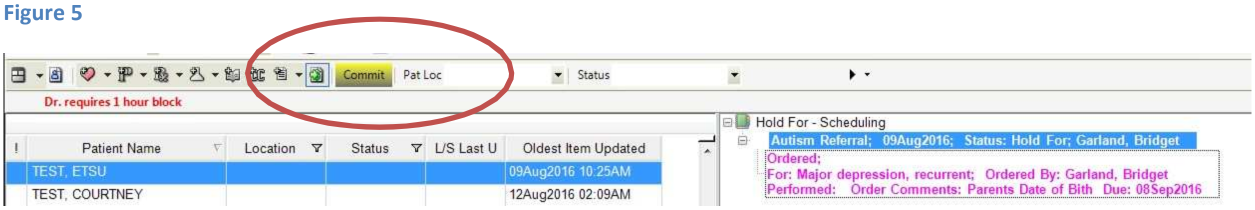

Figure 6

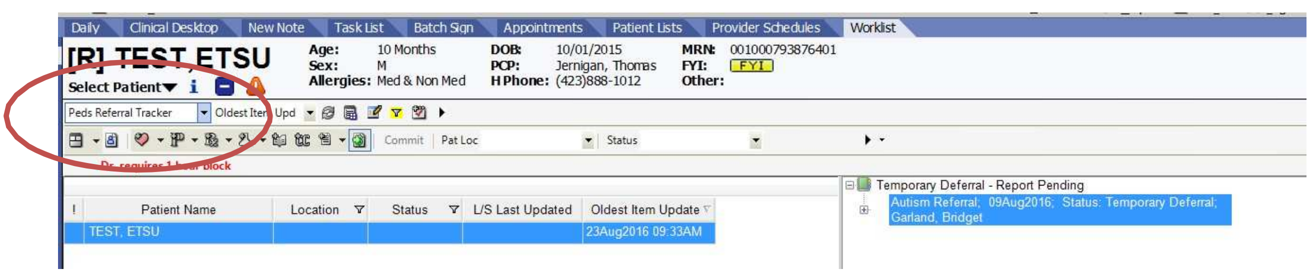

Figure 7

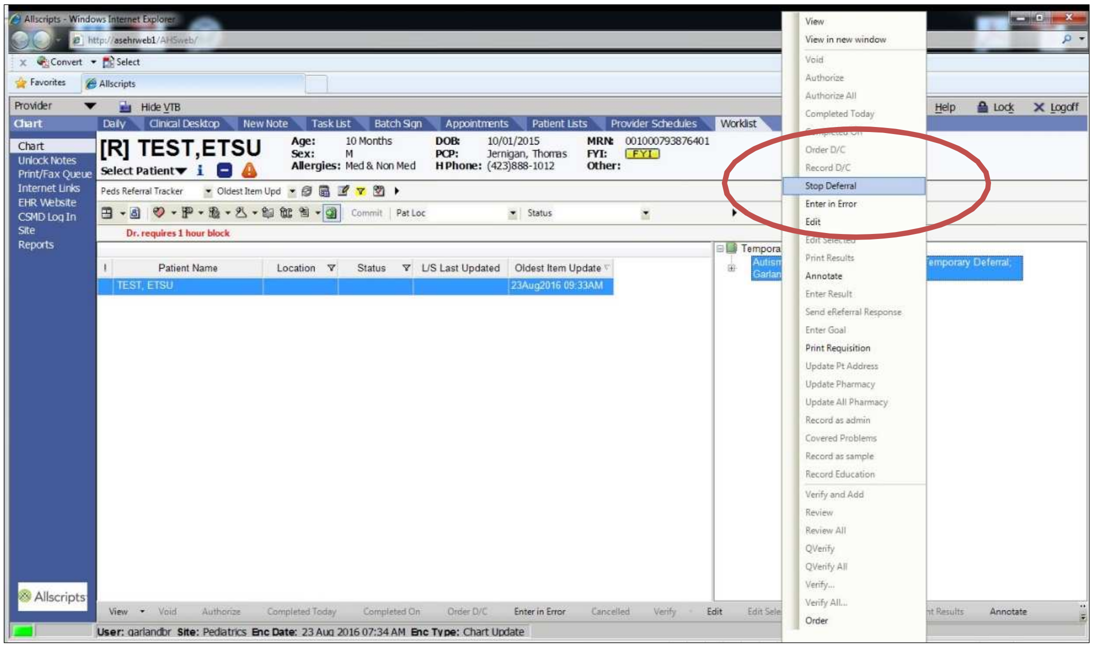

Figure 8

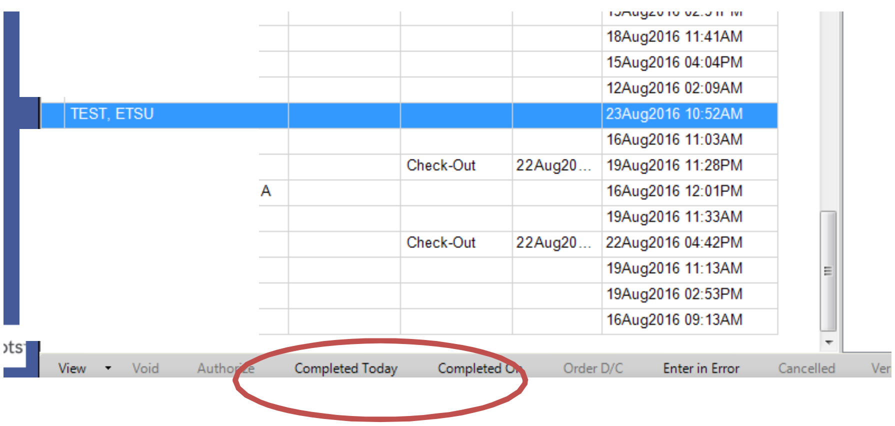

Figure 9