

# Profile EMR: Inward Referral Changes

## Background

Over the years, we have gathered feedback on the Inward Referral Workflow and have the following changes.

**Key workflow change:** **Do NOT close the inward referral at decision point!** You will now close the referral after an accepted client has attended their initial appointment or the referral source has been notified of declined referral.

### View filter changes:

- Modified inward referral view filters with descriptive names regarding status, decision, and progress
- Two sets of filters – a primary set for any program regardless of size and a secondary set for bigger programs with a higher number of referrals with admin staff

## Overview Inward Referral View Filters

There are three main ways to filter referrals: By **Status**, By **Decision**, and By **Progress** (and any combination of these).

| Filter   | Options                        | Definition   |
|----------|--------------------------------|--|
| Status   | Open                           | Default – There are still steps that need to be completed with the referral                                |
|          | Closed                         | There are no more steps that need to be completed with the referral  |
| Decision | Pending                        | Default – No decision has been made but ready for decision   |
|          | Accepted                       | Referral has been accepted   |
|          | Declined                       | Referral has been declined   |
|          | Null/Blank                     | <i>Optional:</i> May be used for referrals with missing requirements and not yet ready for Clinical Review |
| Progress | Null/Blank                     | Default – No progress defined  |
|          | Clinical Review                | Referral is undergoing Clinical Review by the clinician; waiting for decision                              |
|          | Attempting Contact             | Appointment is being attempted to be booked  |
|          | Appointment Booked             | Appointment has been booked  |
|          | Added to Wait List <i>New!</i> | Client has been added to Wait List   |
|          | Completed                      | Referral workflow is complete  |

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## Changes to Inward Referral View Filters

| BEFORE |   | AFTER |  |
|--------|---|-------|--|
| View   | <ul style="list-style-type: none"> <li>In - Received Inward Referrals - Last 60 days</li> <li>In - Received Inward Referrals - Last 120 days</li> <li>In - Received Inward Referrals - Last 2 years</li> <li>In - Received Inward Referrals - Clinical Review</li> <li>In - Accepted Inward Referrals</li> <li>In - Attempting Contact</li> <li>In - Appointment Booked Inward Referrals - Received within 1 year</li> <li>In - Declined Inward Referrals - Received within 1 year</li> <li>In - All Inward Referrals - Received within 30 days</li> <li>In - All Inward Referrals - Received within 90 days</li> <li>In - All Inward Referrals - Received within 180 days</li> </ul> | Views | <ul style="list-style-type: none"> <li>In - Inward Referrals - Open (Current POS)</li> <li>In - Inward Referrals - For All Clinicians - Open and Decision Pending (Current POS)</li> <li>In - Inward Referrals - For Current User Only - Open and Decision Pending (Current POS)</li> <li>In - Inward Referrals - Closed (Received in the Last 1 Year to Current POS)</li> <li>---&gt; In - Inward Referrals - Open and Decision Pending, Clinical Review (Current POS)</li> <li>---&gt; In - Inward Referrals - Open and Decision Accepted (Current POS)</li> <li>---&gt; In - Inward Referrals - Open and Decision Accepted, Attempting Contact (Current POS)</li> <li>---&gt; In - Inward Referrals - Open and Decision Accepted, Appointment Booked (Current POS)</li> <li>---&gt; In - Inward Referrals - Open and Decision Declined (Current POS)</li> </ul> |

### Primary Set of Inward Referral View Filters:

Any program can use these set of filters and can simply sort by any column. These are especially helpful for smaller programs with limited admin staff.

| Filter   | Definition   |
|--|--|
| Inward Referrals – Open (Current POS)  | <p>All Inward Referrals with Open status (regardless of decision and progress)</p> <ul style="list-style-type: none"> <li>• Ideal for smaller programs to manage inward referrals in one view</li> <li>• Default sort by Progress (blanks on top = new referrals)</li> <li>• Looking for an open referral? Check this filter!</li> </ul>   |
| Inward Referrals – For All Clinicians – Open and Decision Pending (Current POS)    | <p>All New Referrals to the program</p> <ul style="list-style-type: none"> <li>• This is the starting point of referral review</li> <li>• No progress referrals on top</li> </ul> <p>Next Step: Has a Decision been made?</p> <ul style="list-style-type: none"> <li>• <b>Yes:</b> Change <b>Decision to Accepted/Declined</b></li> <li>• <b>No:</b> Change <b>Progress to Clinical Review</b> for ongoing review later</li> </ul> |
| Inward Referrals – For Current User Only – Open and Decision Pending (Current POS) | <p>Only New Referrals assigned to me (current user)</p> <ul style="list-style-type: none"> <li>• For clinics that assign referrals to different clinicians/subteams</li> </ul>   |
| Inward Referrals – Closed (Received in the Past 1 Year to Current POS)             | <p>All Inward Referrals with Closed status (regardless of decision and progress)</p> <ul style="list-style-type: none"> <li>• No action required which is why it is limited to those created in the Past 1 Year. If user accidentally closes a referral, it can be found in this filter.</li> </ul>  |

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## Secondary Set of Inward Referral View Filters:

Bigger programs who have admin staff and receive a large amount of referrals may use these set of filters which are very similar to the previous view filters.

| Filter  | Definition  |
|---|---|
| → Inward Referrals – Open and Decision Pending, Clinical Review (Current POS)     | Clinician’s list of referrals still requiring Clinical Review<br>Next Step: Has a Decision been made?<br><ul style="list-style-type: none"> <li>• <b>Yes:</b> Change <b>Decision to Accepted or Declined</b></li> <li>• <b>No:</b> Keep <b>Progress to Clinical Review</b> for review later</li> </ul>  |
| → Inward Referrals – Open and Decision Accepted (Current POS)                     | Admin’s main list of Accepted Referrals (regardless of progress)<br><ul style="list-style-type: none"> <li>• Default sort with Null/Blank Progress on top to view newly-decided-on referrals</li> </ul> Next Step: Has an Appointment been booked?<br><ul style="list-style-type: none"> <li>• <b>Yes:</b> Change <b>Progress to Appointment Booked</b></li> <li>• <b>No:</b> Change <b>Progress to Attempting Contact</b></li> </ul> |
| → Inward Referrals – Open and Decision Accepted, Attempting Contact (Current POS) | Admin’s list of referrals with no appointment booked<br>Next Step: Has an Appointment been booked?<br><ul style="list-style-type: none"> <li>• <b>Yes:</b> Change <b>Progress to Appointment Booked</b></li> <li>• <b>No:</b> Keep <b>Progress to Attempting Contact</b></li> </ul>   |
| → Inward Referrals – Open and Decision Accepted, Appointment Booked (Current POS) | Admin’s list of referrals with appointment booked<br>Next Step: Has client attended their initial appointment?<br><ul style="list-style-type: none"> <li>• <b>Yes:</b> Change <b>Status to Closed</b></li> <li>• <b>No:</b> Change <b>Progress to Attempting Contact</b></li> </ul>   |
| → Inward Referrals – Open and Decision Declined (Current POS)                     | Admin’s list of declined referrals<br>Next Step: Does referral source need to be informed of decision?<br><ul style="list-style-type: none"> <li>• <b>Yes:</b> Send notice to referral source then change <b>Status to Closed</b></li> <li>• <b>No:</b> Change <b>Status to Closed</b></li> </ul>   |

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## Changes to the Inward Referral Workflow

| Workflow                                | Staff           | BEFORE  | AFTER   | Reason for Change  |
|---|-----------------|---|---|--|
| 1 – Receiving NEW Inward Referrals      | ADMIN           | Set <b>Progress to Clinical Review</b> right away   | <b>Progress can be left Blank</b>   | Gives clinician ability to distinguish between New Referral (progress = Null/Blank) vs Referral Already in Clinical Review (progress = Clinical review).       |
| 2a – Viewing NEW Inward Referrals       | CLINICIAN       | Use filter: <b>Received Inward Referrals – Clinical Review</b>  | Use filter: <b>Inward Referrals – For All Clinicians – Open and Decision Pending (Current POS)</b><br>OR<br>Use filter: <b>Inward Referrals – For Current User Only – Open and Decision Pending (Current POS)</b> | For clinics with multiple services where referrals may be assigned to different clinicians, gives clinician ability to filter only referrals assigned to them. |
| 2b – Viewing In-Review Inward Referrals | CLINICIAN       | Use filter: <b>Received Inward Referrals – Clinical Review</b>  | Use filter: → <b>Inward Referrals – Open and Decision Pending, Clinical Review (Current POS)</b>  | Gives clinician ability to distinguish between New Referral (progress = Null/Blank) vs Referral Already in Clinical Review (progress = Clinical review).       |
| 3a – Accepting Referrals                | CLINICIAN       | Change <b>Decision to Accepted</b><br>Change <b>Status to Closed</b><br>Change <b>Progress to Completed</b> | <b>DO NOT CLOSE!</b><br>Change <b>Decision to Accepted</b>  | Prevents “lost” referrals when one of the three steps is missed.   |
| 3b – Declining Referrals                | CLINICIAN       | Change <b>Decision to Declined</b><br>Change <b>Status to Closed</b><br>Change <b>Progress to Completed</b> | <b>DO NOT CLOSE!</b><br>Change <b>Decision to Declined</b>  | Gives admin ability to view declined referrals that need to be actioned, such as informing referral source.  |
| 4 – Managing Accepted Referrals         | ADMIN           | Use filter: <b>Accepted Inward Referrals (status = Closed)</b>  | Use filter: → <b>Inward Referrals – Open and Decision Accepted (Current POS)</b>  | Referral still requiring action and therefore status = Open.   |
| 4a – Adding to Wait List <i>Coming!</i> | ADMIN/CLINICIAN | N/A   | Change <b>Progress to Added to Wait List <i>Coming!</i></b><br>Change <b>Status to Closed</b>   | New progress option that will be added to list soon!   |

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| Workflow                            | Staff | BEFORE   | AFTER   | Reason for Change   |
|-------------------------------------|-------|--|---|---|
| 5 – Booking Appointment             | ADMIN | Use filter: <b>Attempting Contact</b><br>( <i>status = Closed</i> )<br>OR<br>Use filter: <b>Appointment Booked Inward Referrals – Received within 1 Year</b> ( <i>status = Closed</i> )                                  | Use filter: → <b>Inward Referrals – Open and Decision Accepted , Attempting Contact (Current POS)</b><br>OR<br>Use filter: → <b>Inward Referrals – Open and Decision Accepted, Appointment Booked (Current POS)</b> | Referral still requiring action and therefore status = Open.<br><br>Filter name is descriptive of status, decision, and progress.     |
| 6 – Closing Referrals               | ADMIN | N/A  | Use filter: → <b>Inward Referrals – Open and Decision Accepted, Appointment Booked (Current POS)</b>  | New workflow of closing referrals later in the process.   |
| 7 – Managing Declined Referrals     | ADMIN | Use filter: <b>Declined Inward Referrals – Received within 1 Year</b> ( <i>status = Closed</i> )   | Use filter: → <b>Inward Referrals – Open and Decision Declined (Current POS)</b>  | Referral may still require action, such as informing referral source, and therefore status = Open.                                    |
| 8 – Viewing CLOSED Inward Referrals | ADMIN | N/A  | Use filter: <b>Inward Referrals – Closed (Received in the Past 1 Year to Current POS)</b>   | Gives ability to view only Closed Referrals (including clients who have been added to Wait List) where no further action is required. |
| Lost Referrals                      | ADMIN | Use filter: <b>All Inward Referrals – Received within 30 days</b><br>OR<br>Use filter: <b>All Inward Referrals – Received within 90 days</b><br>OR<br>Use filter: <b>All Inward Referrals – Received within 180 days</b> | Use filter: <b>Inward Referrals – Open (Current POS)</b><br>OR<br>Use filter: <b>Inward Referrals – Closed (Received in the Past 1 Year to Current POS)</b>   | There will be no lost referrals. All referrals will be in either of these two filters – Open or Closed.                               |