Assigning a Referral and My Watch List

Bridge Referral Application User Guide

Assigning a Referral is useful for organizations with multiple staff managing referrals. Assigning referrals assists in streamlining and distributing workflow.

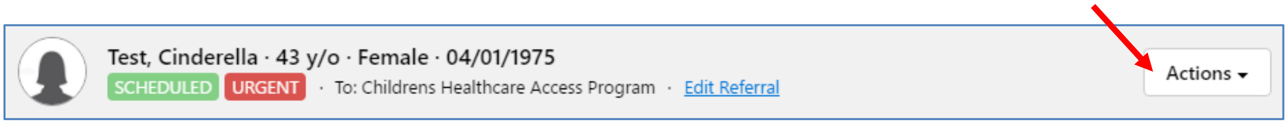
Referral users can assign or re-assign referrals to themselves or another user within their organization. Referrals can only be assigned to one user at a time.

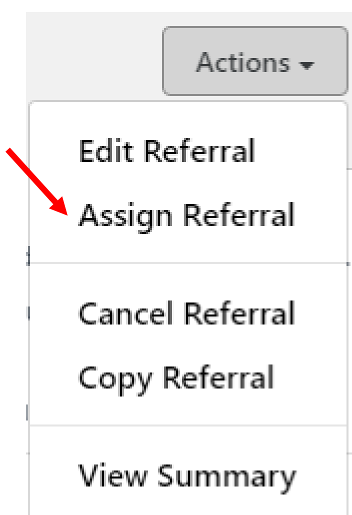
The Bridge Referral Application has a feature called “My Watch List”. This feature is separate from the Assigning feature. A Referral can be on multiple users Watch List.

How to assign a Referral

Open the Referral Application. Find and select the referral that needs to be assigned, the details of the referral will display in the Detail and Timeline panel.

Next, click the Actions button in the top right corner and then click **Assign Referral**.

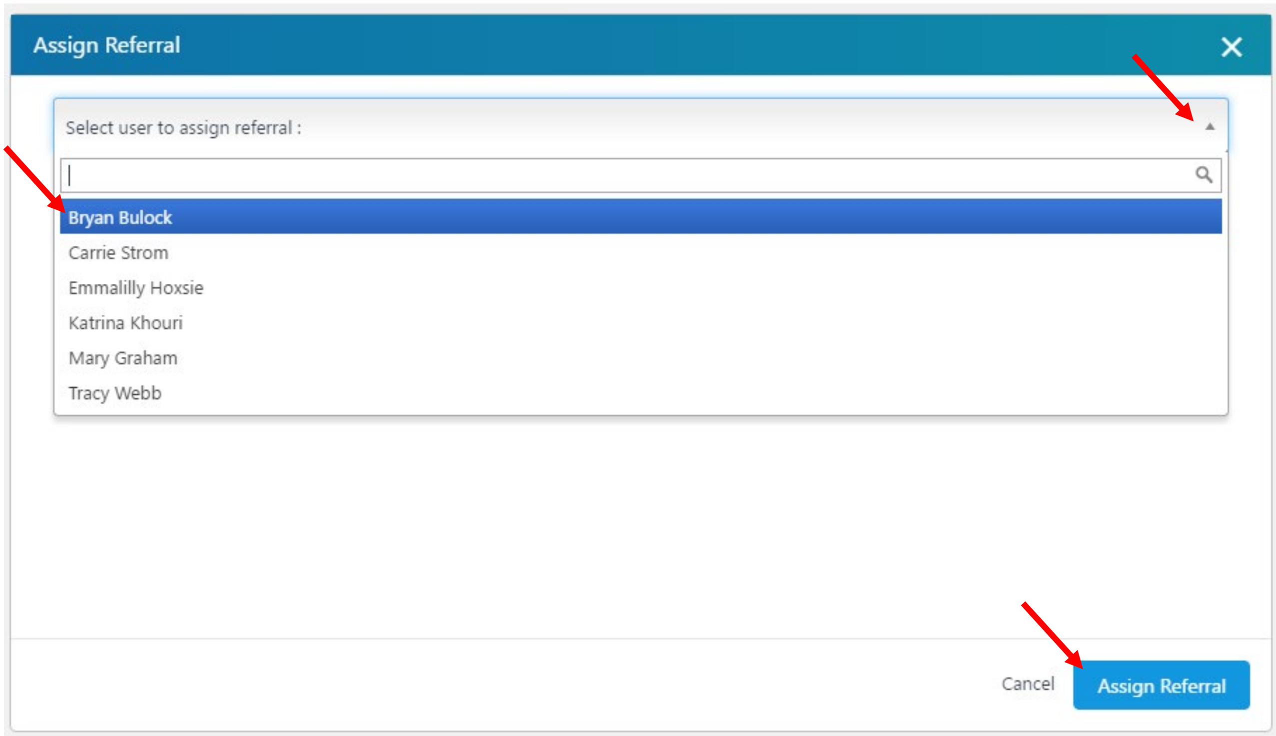




A new screen will open with a drop down menu.

Click the dropdown menu to see the list of active users for the organization. Search, or scroll, to find the desired user. Click the name of the user that the referral should be assigned to.

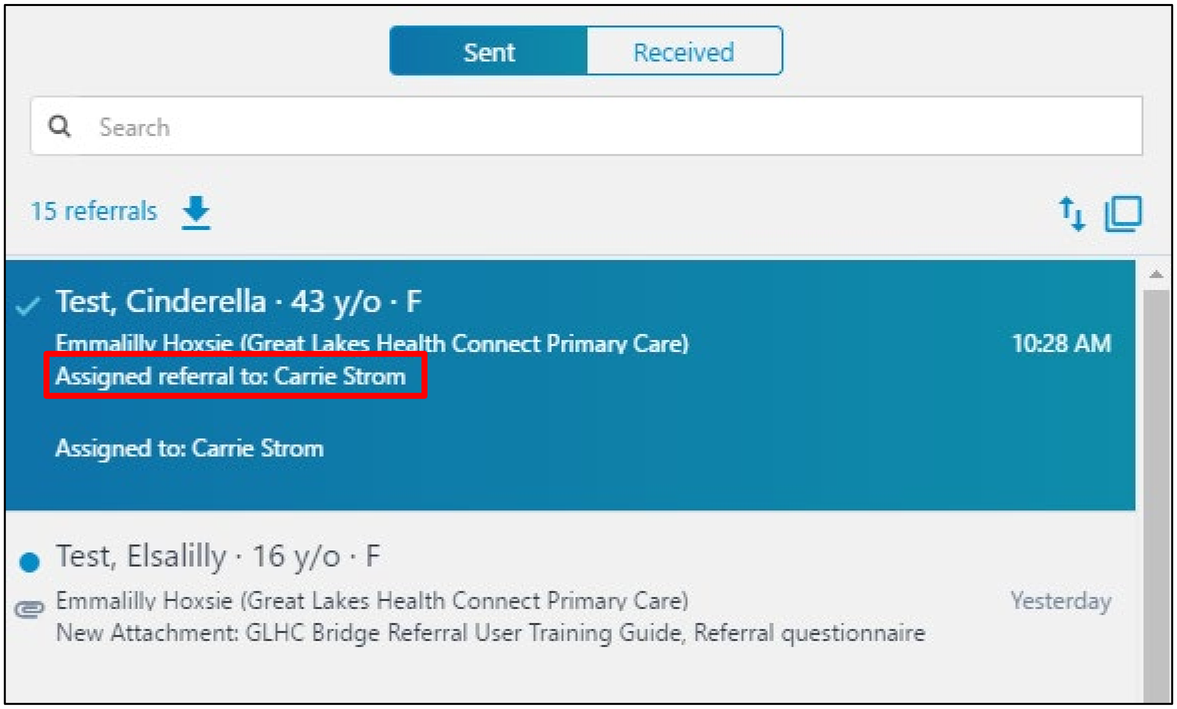
Click **Assign Referral** to save the selection.



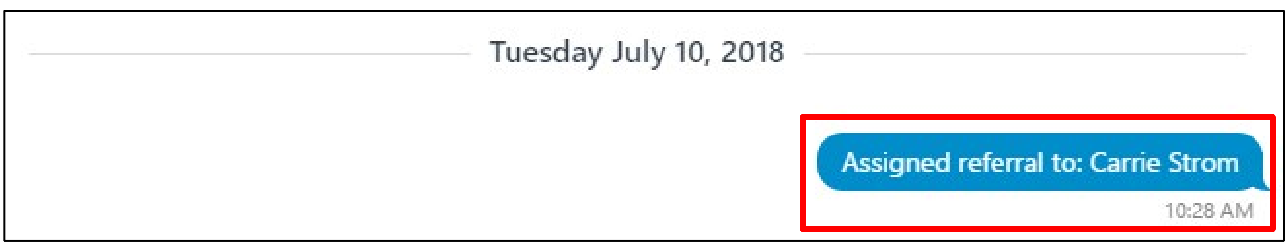
Viewing the Assignment status

There are three ways to see which user is assigned to a referral.

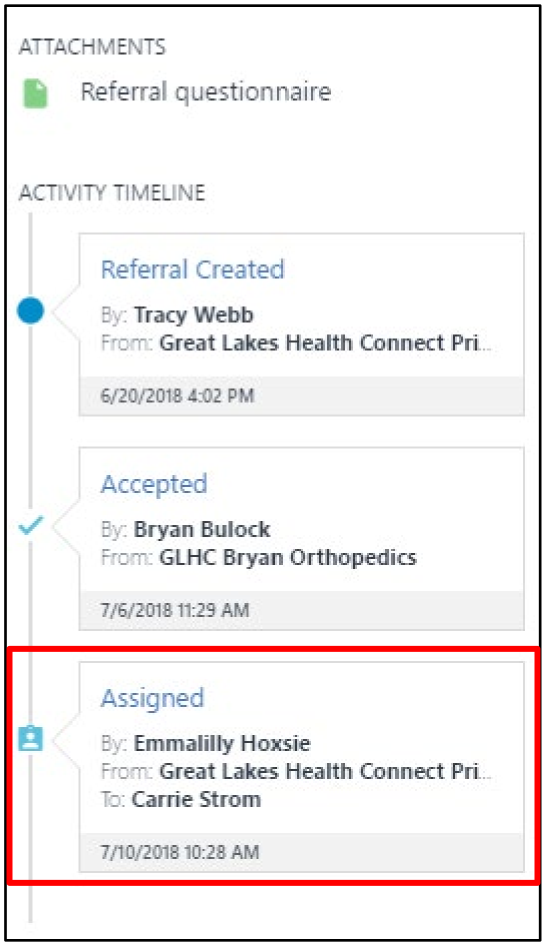
1. In the Worklist panel.



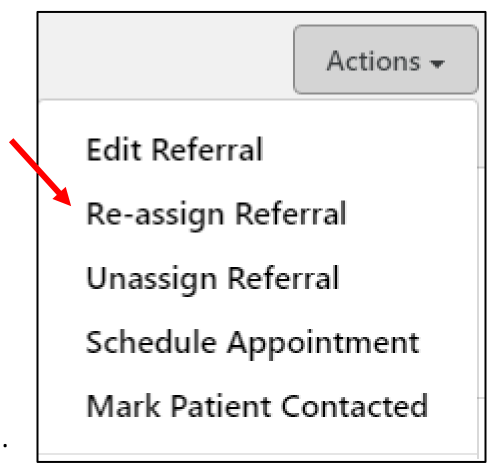
2. Within the Referral Details / Messaging panel.



3. Within the Timeline panel.



Re-assign a Referral



Only referrals that are currently assigned to a user can be re-assigned.

Find and select the referral that needs to be re-assigned, the details of the referral will display in the Detail and Timeline panel.

Click the Actions button in the top right corner and then click **Re - Assign Referral**.

A new screen will open with a drop down menu. Click the dropdown menu to see the list of active users for the organization. Search, or scroll, to find the desired user. Click the name of the user that the referral should be assigned to. Click **Assign Referral** to save the selection.

This re-assignment will be displayed in all three panels.

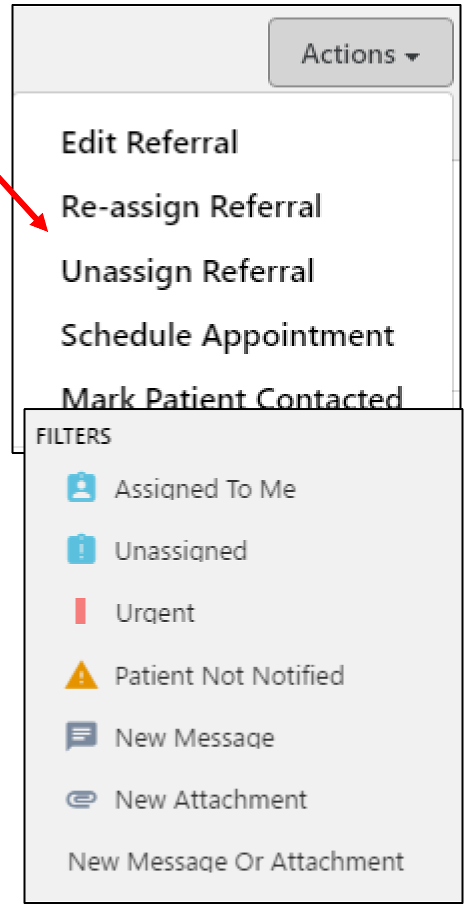
Unassign a Referral

Referrals that are currently assigned to a user can be unassigned.

Find and select the referral that needs to be re-assigned, the details of the referral will display in the Detail and Timeline panel.

Click the Actions button in the top right corner and then click **Unassign Referral**.

This unassignment will be displayed in all three panels.

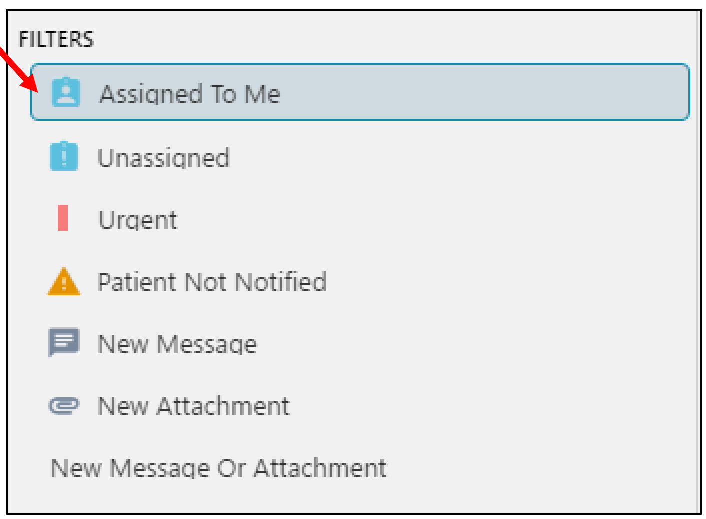


Assignment Filters

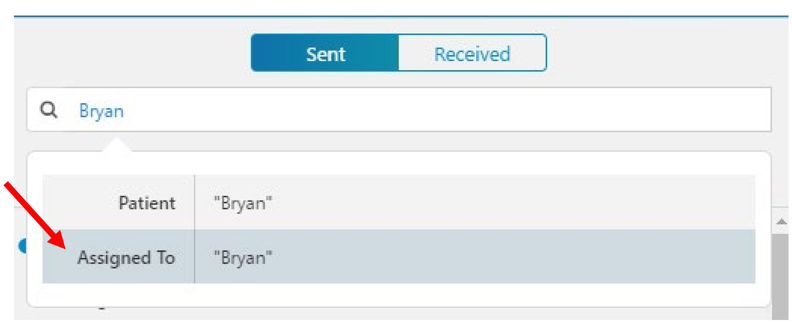
When viewing a group of referrals in the Worklist panel, there are two built in filters related to assignment. “Assigned to Me” filters the list to only show referrals assigned to the current user. The “Unassigned” filter shows all referrals that are not assigned to a user.

There are two ways to turn these filters on.

Option One: Click **Assigned To Me** in the organization panel.

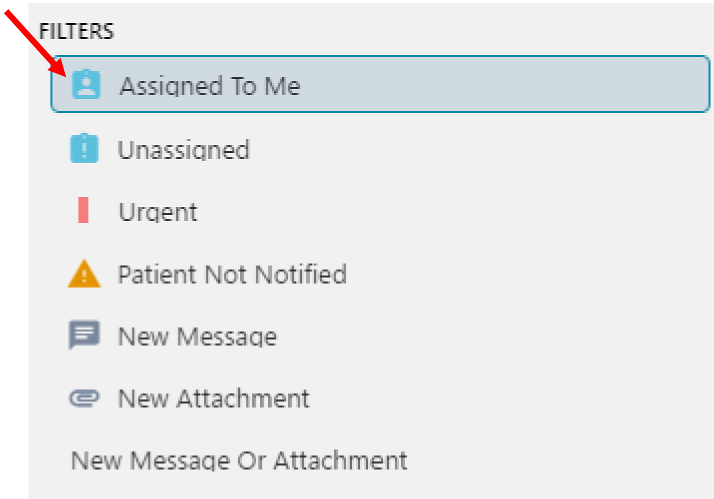


Option Two: In the Search bar at the top of the Referral Worklist panel, type the name of the user and then click Assigned To.

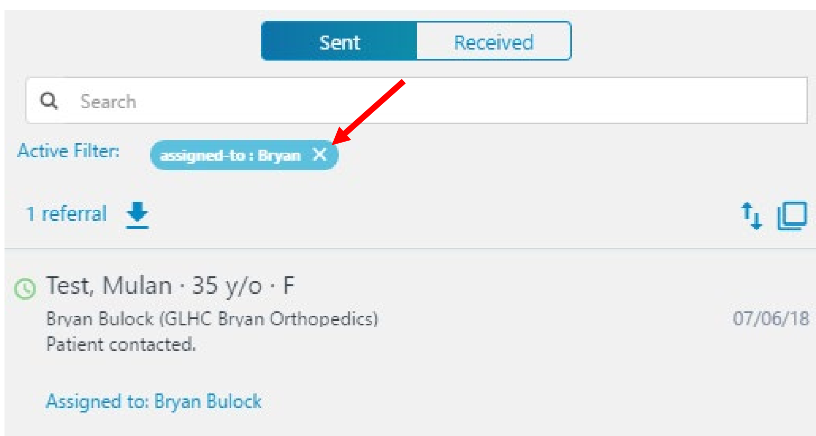


There are two ways to turn the Assign filters off.

Option One: Click the highlighted filter to deselect.



Option Two: Click the "x" to the right of the filter bubble at the top of the Worklist Panel



My Watch List

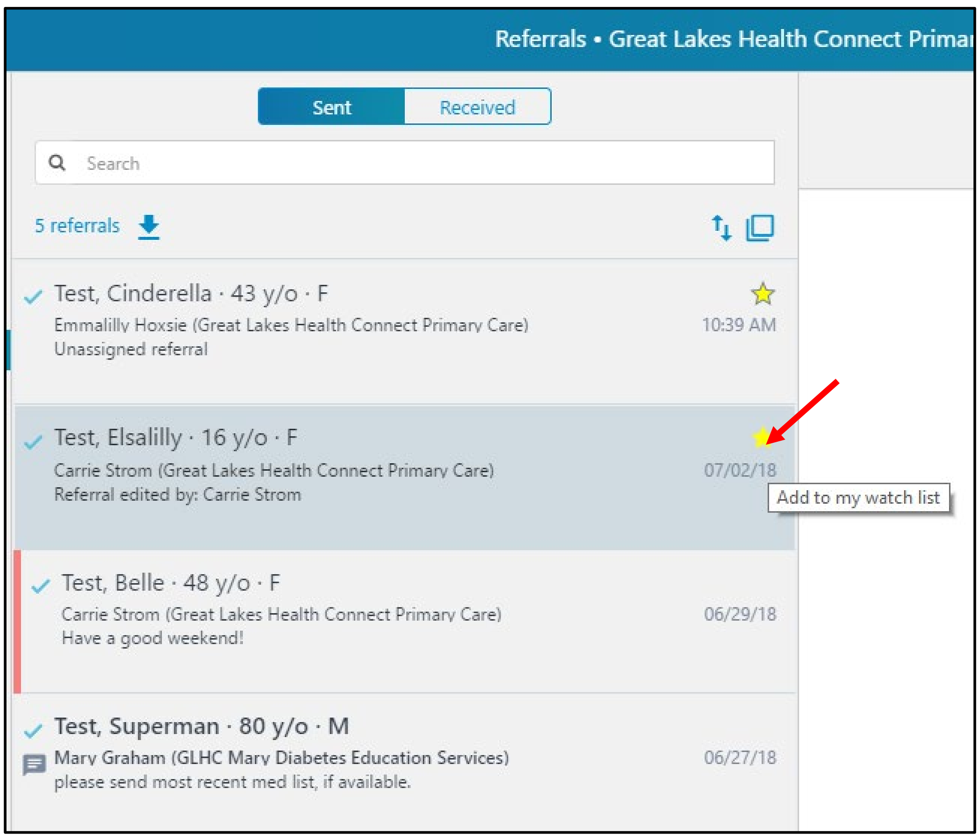
Any referral can be added to a user's personal watch list. The Watch List is separate from the "Assign to" function. A referral can be on the Watch List of multiple users, but only assigned to one user at a time.

User might want to add referrals to their Watch List for several reasons:

- Waiting for a phone call back from the patient or other resource
- Waiting for test results to come in, to add to the referral as an attachment
- Watching for the scheduled date to track for timeliness
- Need more information before able to answer a question that came in a message
- Question about a referral came from a patient or another practice, and need to ask the person the referral is assigned to when they return

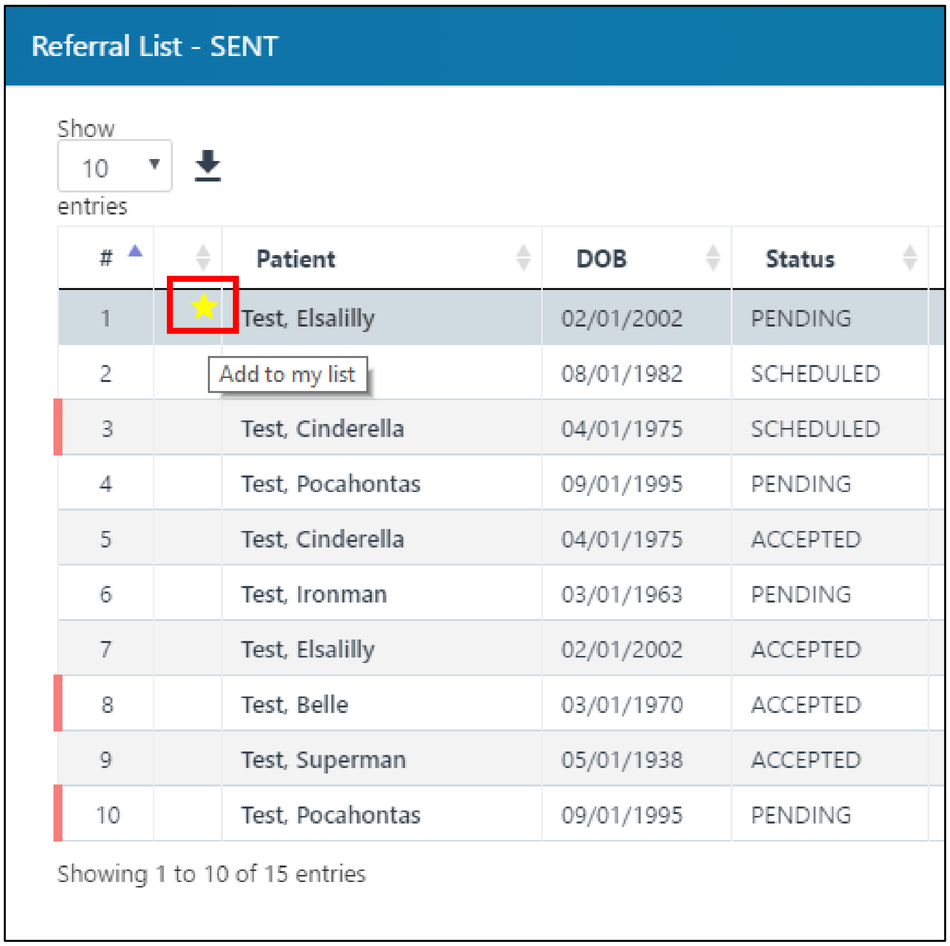
Adding referrals to My Watch List

1. Locate the referral in the Worklist panel.
2. Hover over the top right corner of the referral in the worklist panel, a grey star will appear and then turn yellow.
3. Click on the star, it will stay yellow with a black outline.



Adding referrals to My Watch List from the Large View Worklist

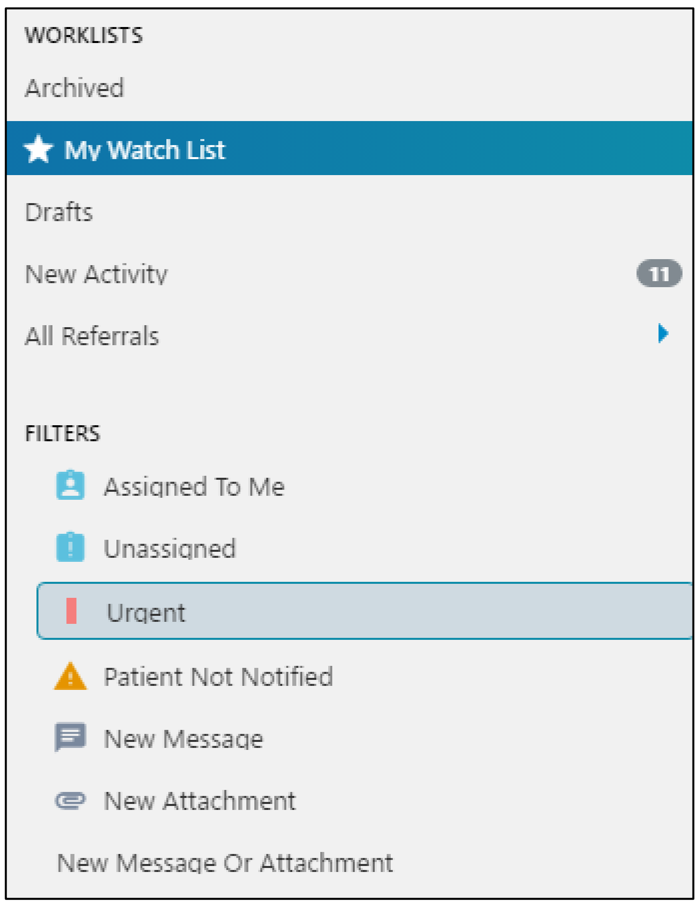
1. Use the organization panel to locate a batch or group of referrals.
2. Click the Large View Worklist button in the Worklist panel to open the Large View Worklist.
3. Further sort or search the worklist as desired.
4. The second column from the left is the **My Watch List** column. Use the mouse to hover over the intersection of that column and the line of the referral that you would like to add to your list.
5. A grey star will appear and will become yellow.
6. Click once to add the referral to your list.
7. The Large View Worklist will close and the selected referral will be open back in the main page.



Viewing referrals on My Watch List

To view referrals that you have previously added to your watch list, click **My Watch List** in the Organization panel.

This list view can be combined with other filters in the organization panel. For example, you might want to view referrals on your watch list that are also marked urgent.



To view a different group of referrals, click a different worklist in the organization panel: Archived, Drafts, New Activity, or All Referrals.

Removing referrals from My Watch List

To remove a referral from your **Watch List**, click on the yellow star in the upper right hand corner of the referral in the Worklist panel.

Referrals can also be removed from the **Watch List** from the Large View Worklist by clicking on the yellow arrow once.