



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.

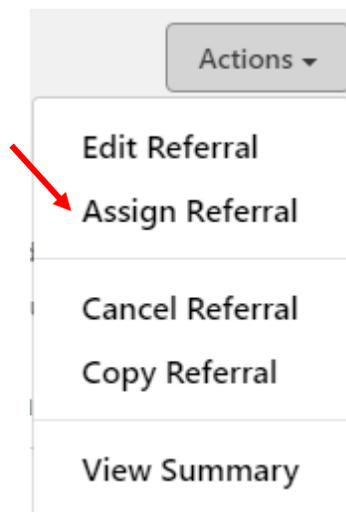
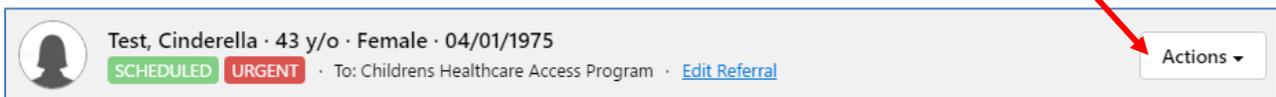
Referral users can assign or re-assign referrals to themselves or another user within their organization. Referrals can only be assigned to one user at a time.

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.

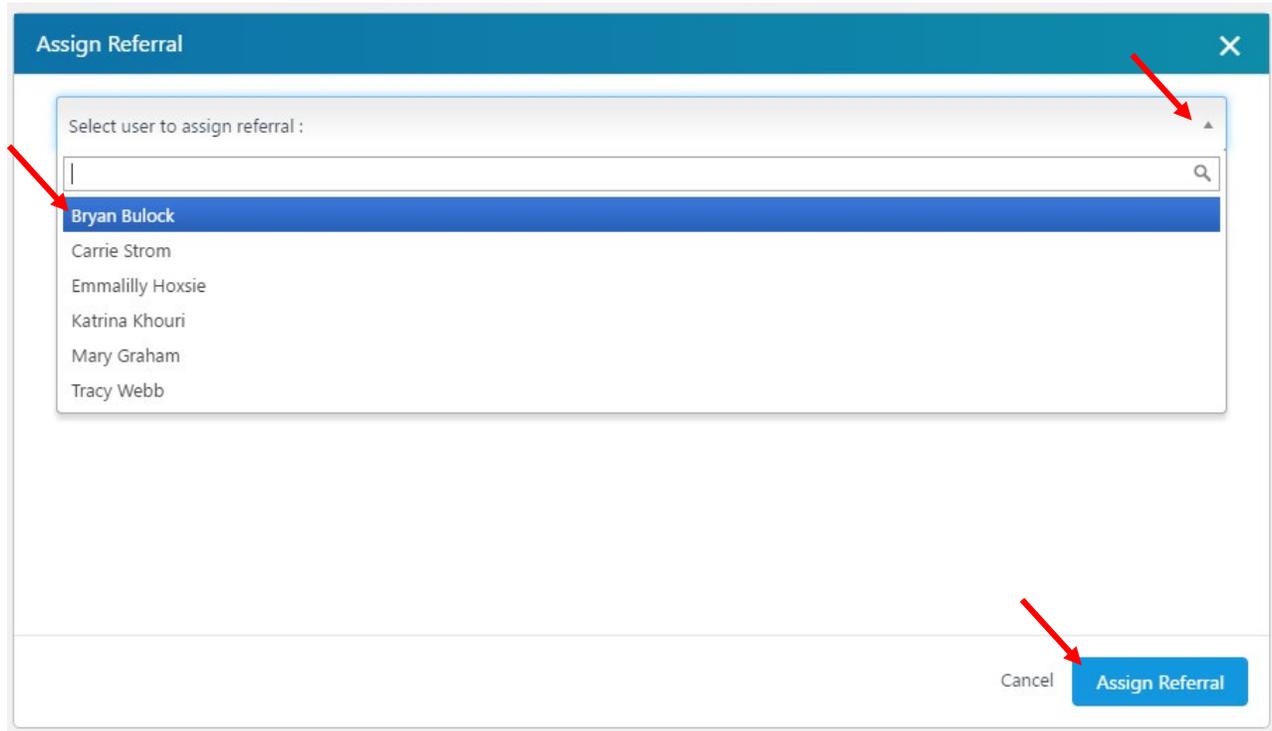
Next, click the Actions button in the top right corner and then click **Assign Referral**.



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.

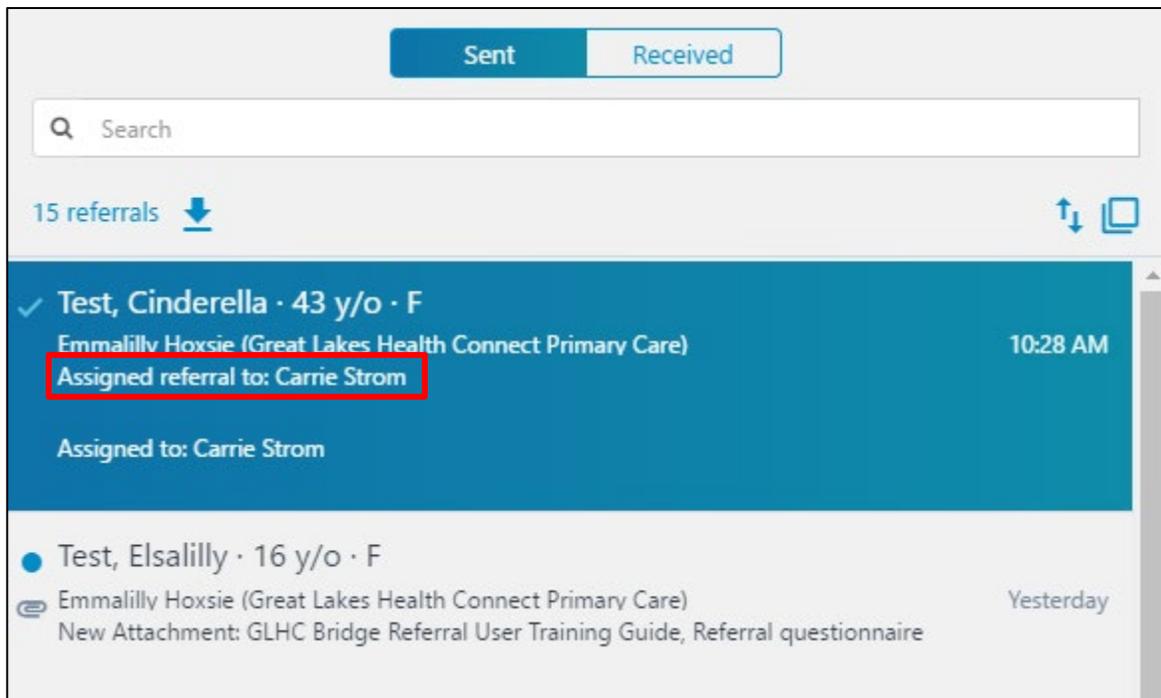


The screenshot shows a dialog box titled "Assign Referral" with a close button (X) in the top right corner. Inside the dialog, there is a text input field with the placeholder text "Select user to assign referral :". Below the input field is a search icon. A dropdown menu is open, displaying a list of user names: Bryan Bullock, Carrie Strom, Emmalilly Hoxsie, Katrina Khouri, Mary Graham, and Tracy Webb. The name "Bryan Bullock" is highlighted in blue. At the bottom right of the dialog, there are two buttons: "Cancel" and "Assign Referral". Red arrows point to the close button, the dropdown menu, and the "Assign Referral" button.

Viewing the Assignment status

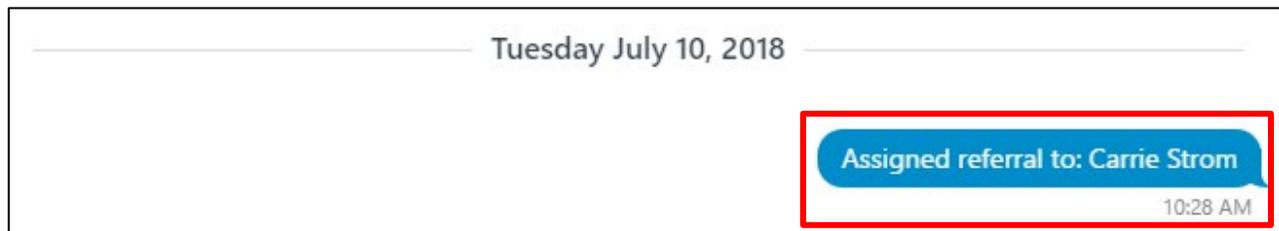
There are three ways to see which user is assigned to a referral.

1. In the Worklist panel.



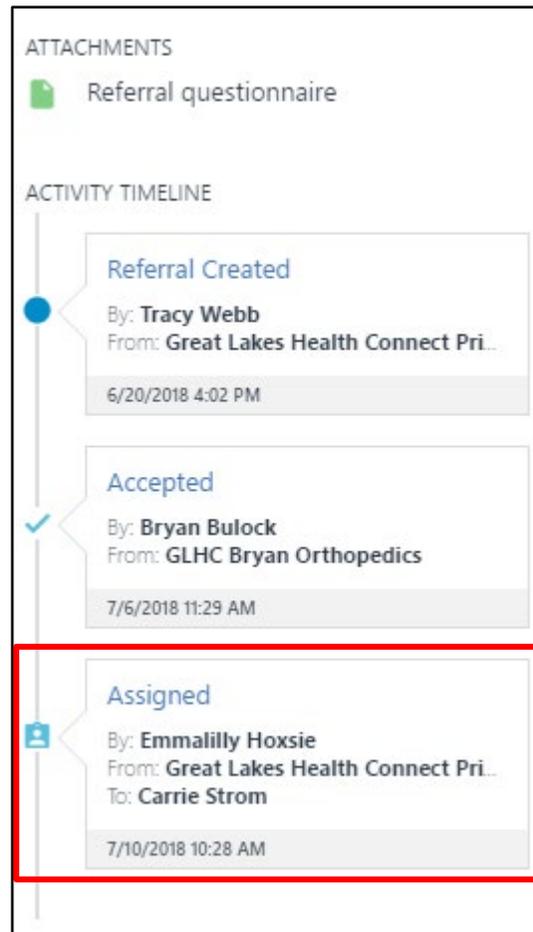
The screenshot shows a software interface for viewing referrals. At the top, there are two tabs: "Sent" (active) and "Received". Below the tabs is a search bar with a magnifying glass icon and the text "Search". Underneath the search bar, it says "15 referrals" with a downward arrow icon. To the right of this are two icons: a double-headed arrow and a square icon. The main area displays a list of referrals. The first referral is highlighted in blue and contains the following text: "Test, Cinderella · 43 y/o · F", "Emmalilly Hoxsie (Great Lakes Health Connect Primary Care)", "Assigned referral to: Carrie Strom" (this text is enclosed in a red rectangular box), and "Assigned to: Carrie Strom". The time "10:28 AM" is shown on the right side of this entry. Below this is another referral entry: "Test, Elsalilly · 16 y/o · F", "Emmalilly Hoxsie (Great Lakes Health Connect Primary Care)", "New Attachment: GLHC Bridge Referral User Training Guide, Referral questionnaire", and "Yesterday".

2. Within the Referral Details / Messaging panel.



The screenshot shows a messaging panel with a date separator "Tuesday July 10, 2018" centered at the top. Below the date, there is a blue message bubble containing the text "Assigned referral to: Carrie Strom". The time "10:28 AM" is displayed at the bottom right of the message bubble. The entire message bubble and its associated time are enclosed in a red rectangular box.

3. Within the Timeline panel.



ATTACHMENTS

- Referral questionnaire

ACTIVITY TIMELINE

- Referral Created**
 By: Tracy Webb
 From: Great Lakes Health Connect Pri...
 6/20/2018 4:02 PM
- Accepted**
 By: Bryan Bullock
 From: GLHC Bryan Orthopedics
 7/6/2018 11:29 AM
- Assigned**
 By: Emmalilly Hoxsie
 From: Great Lakes Health Connect Pri...
 To: Carrie Strom
 7/10/2018 10:28 AM

Re-assign a Referral

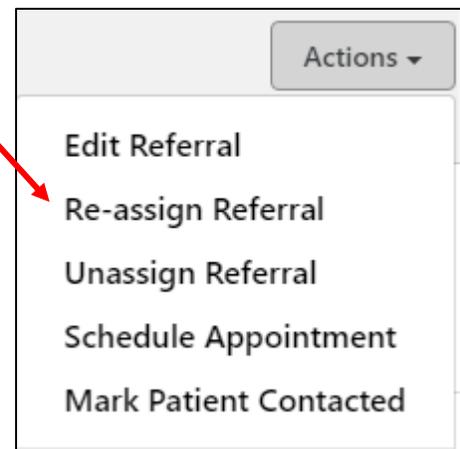
Only referrals that are currently assigned to a user can be re-assigned.

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.



Actions ▾

- Edit Referral
- Re-assign Referral
- Unassign Referral
- Schedule Appointment
- Mark Patient Contacted

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**.

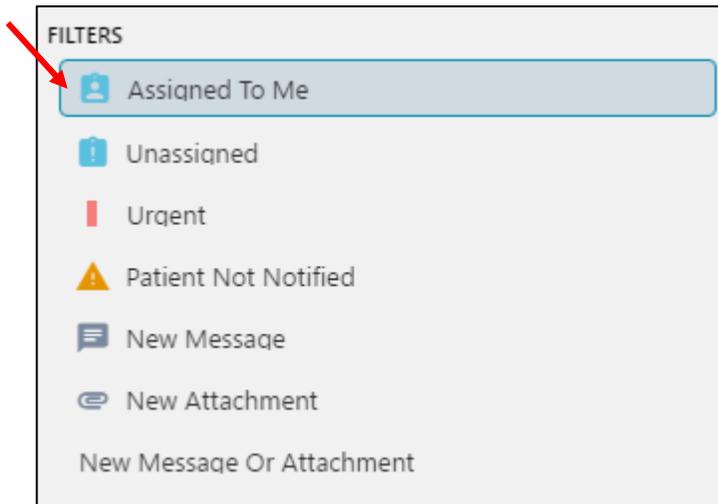
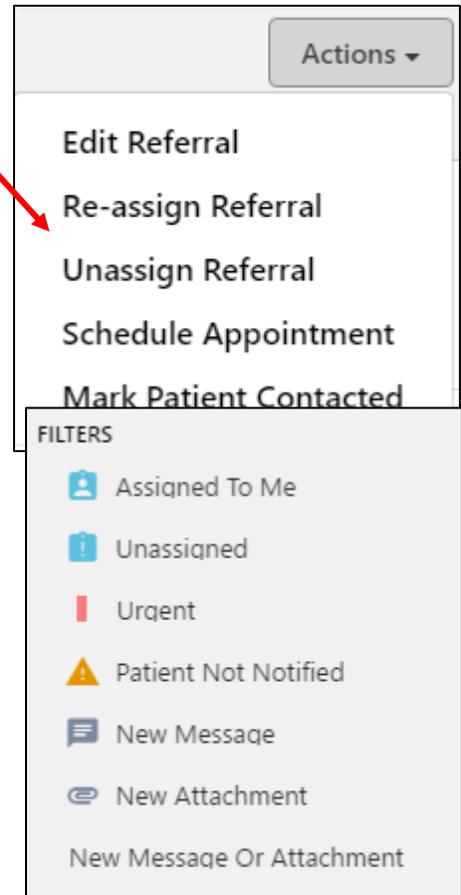
This unassignment will be displayed in all three panels.

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.

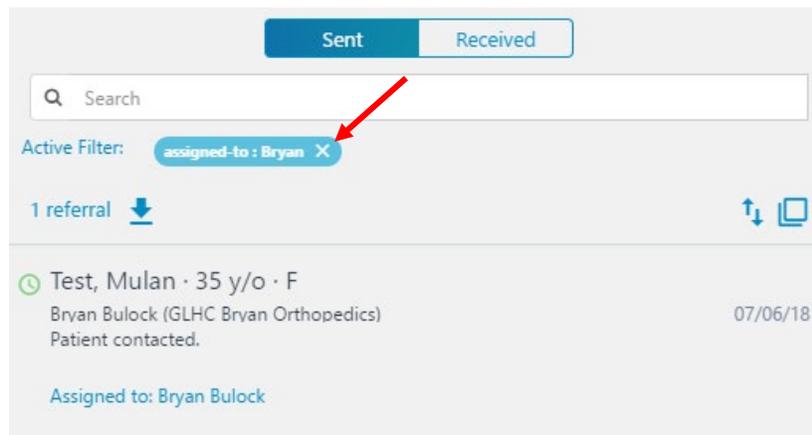


There are two ways to turn the Assign filters off.

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

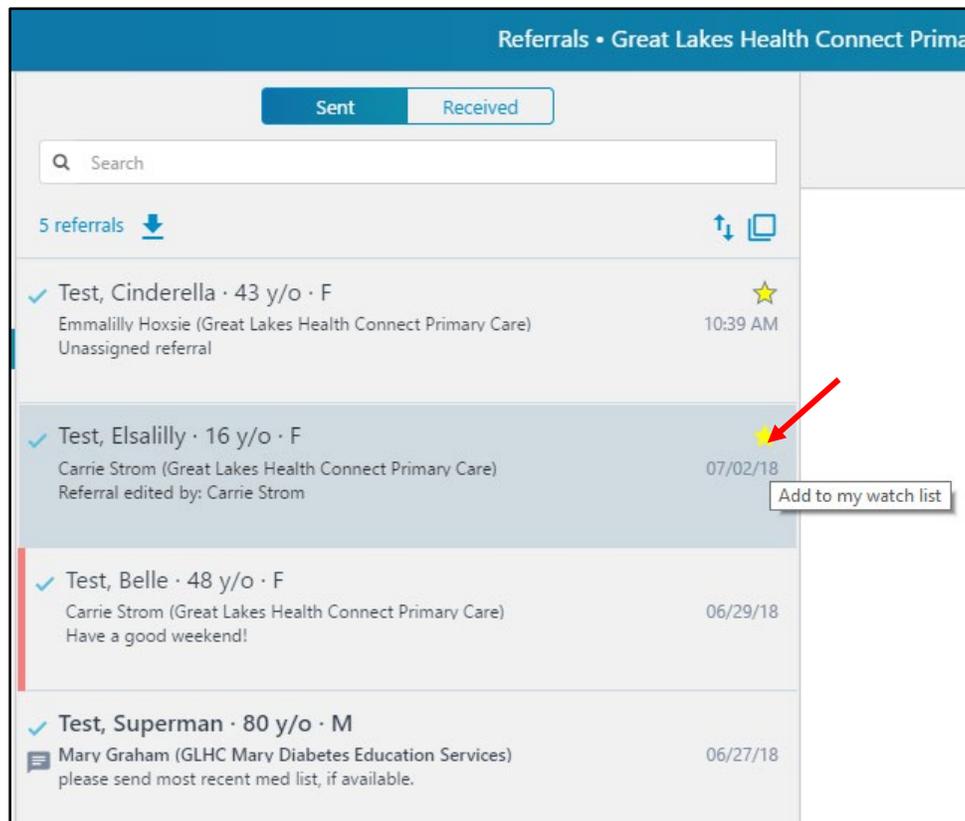
Any referral can be added to a user's personal watch list. The Watch List is separate from the "Assign to" function. A referral can be on the Watch List of multiple users, but only assigned to one user at a time.

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.



Referrals • Great Lakes Health Connect Primary Care

Sent Received

Search

5 referrals

| | | |
|---|----------|---|
| ✓ Test, Cinderella · 43 y/o · F Emmalilly Hoxsie (Great Lakes Health Connect Primary Care) Unassigned referral | 10:39 AM | ★ |
| ✓ Test, Elsalilly · 16 y/o · F Carrie Strom (Great Lakes Health Connect Primary Care) Referral edited by: Carrie Strom | 07/02/18 | ★ |
| ✓ Test, Belle · 48 y/o · F Carrie Strom (Great Lakes Health Connect Primary Care) Have a good weekend! | 06/29/18 | |
| ✓ Test, Superman · 80 y/o · M Mary Graham (GLHC Mary Diabetes Education Services) please send most recent med list, if available. | 06/27/18 | |

Add to my watch list

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.

Referral List - SENT

Show 
entries

| # | | Patient | DOB | Status |
|----|---|------------------|------------|-----------|
| 1 |  | Test, Elsalilly | 02/01/2002 | PENDING |
| 2 |  | | 08/01/1982 | SCHEDULED |
| 3 | | Test, Cinderella | 04/01/1975 | SCHEDULED |
| 4 | | Test, Pocahontas | 09/01/1995 | PENDING |
| 5 | | Test, Cinderella | 04/01/1975 | ACCEPTED |
| 6 | | Test, Ironman | 03/01/1963 | PENDING |
| 7 | | Test, Elsalilly | 02/01/2002 | ACCEPTED |
| 8 | | Test, Belle | 03/01/1970 | ACCEPTED |
| 9 | | Test, Superman | 05/01/1938 | ACCEPTED |
| 10 | | Test, Pocahontas | 09/01/1995 | PENDING |

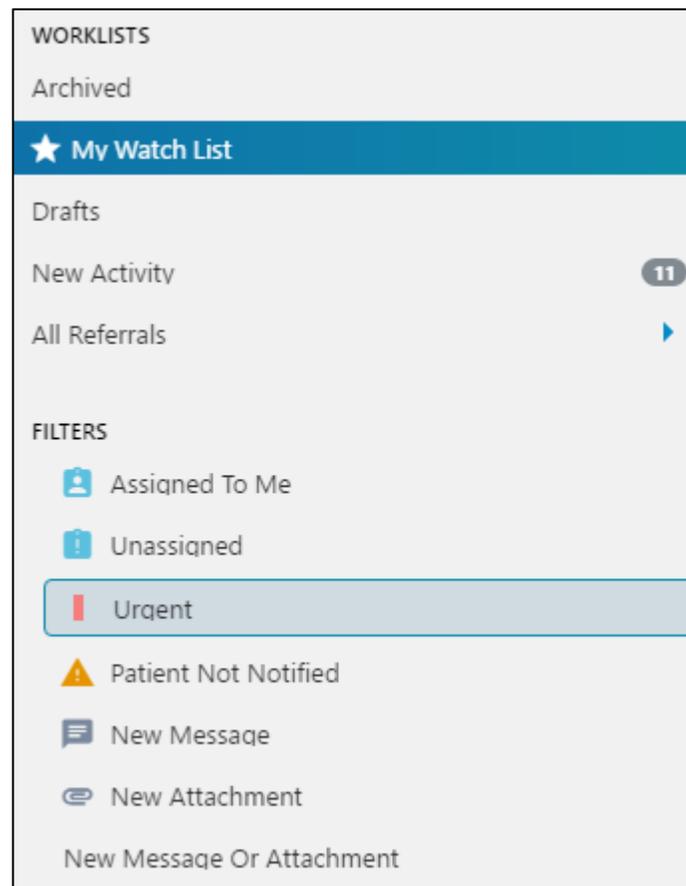
Showing 1 to 10 of 15 entries

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.

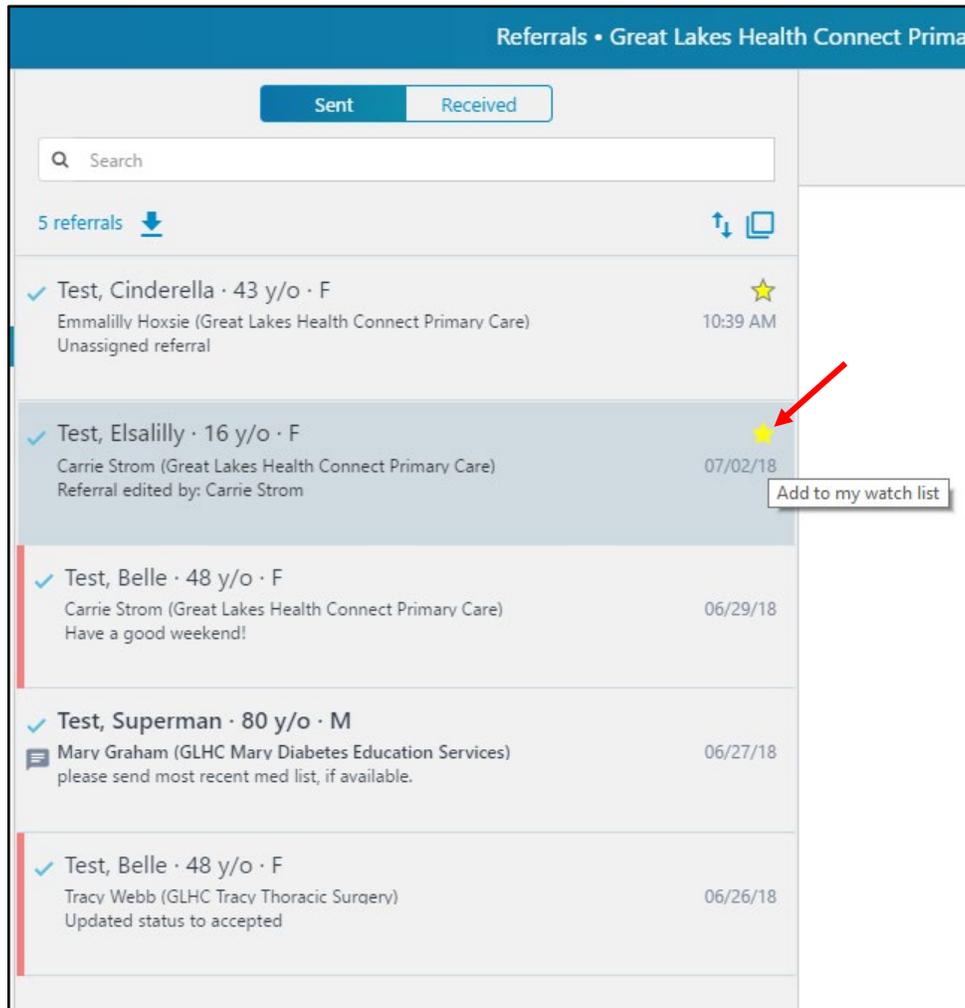


To view a different group of referrals, click a different worklist in the organization panel: Archived, Drafts, New Activity, or All Referrals.

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.



The screenshot shows a web interface titled "Referrals • Great Lakes Health Connect Primary Care". It features a search bar, a "5 referrals" indicator, and a list of five referral entries. Each entry includes a checkmark, patient name, age, gender, provider name, and a date. A yellow star icon is visible in the top right corner of the second entry, with a red arrow pointing to it and a tooltip that says "Add to my watch list".

| Referral ID | Patient Name | Age | Gender | Provider | Date | Notes |
|-------------|------------------|--------|--------|--|----------|---|
| 1 | Test, Cinderella | 43 y/o | F | Emmalilly Hoxsie (Great Lakes Health Connect Primary Care) | 10:39 AM | Unassigned referral |
| 2 | Test, Elsalilly | 16 y/o | F | Carrie Strom (Great Lakes Health Connect Primary Care) | 07/02/18 | Referral edited by: Carrie Strom |
| 3 | Test, Belle | 48 y/o | F | Carrie Strom (Great Lakes Health Connect Primary Care) | 06/29/18 | Have a good weekend! |
| 4 | Test, Superman | 80 y/o | M | Mary Graham (GLHC Mary Diabetes Education Services) | 06/27/18 | please send most recent med list, if available. |
| 5 | Test, Belle | 48 y/o | F | Tracy Webb (GLHC Tracy Thoracic Surgery) | 06/26/18 | Updated status to accepted |