Organization Panel

Worklists, Filters, and Favorite Partners

Bridge Referral Application User Guide

There are many ways to view different groups or batches of referrals within the GLHC Bridge Referral Application. The panel on the far left hand of the Referral Application, called the Organization Panel, provides different options for sorting referrals and for looking at different groups of referrals based on their criteria.

Worklists

Archived

Archived referrals are only available in this folder. Referrals created and either cancelled, completed, or declined before August 2017 have been archived by GLHC. Referrals created since then can be archived only by the organization that sent the referral.

The only way to see these referrals is to search for them using Date From, Date To, Sent To, First Name, or Last Name The Search requires either a date range or a sent to value.

For instruction on how to archive a referral - check out the Archived Referrals User Guide.

My Watch List

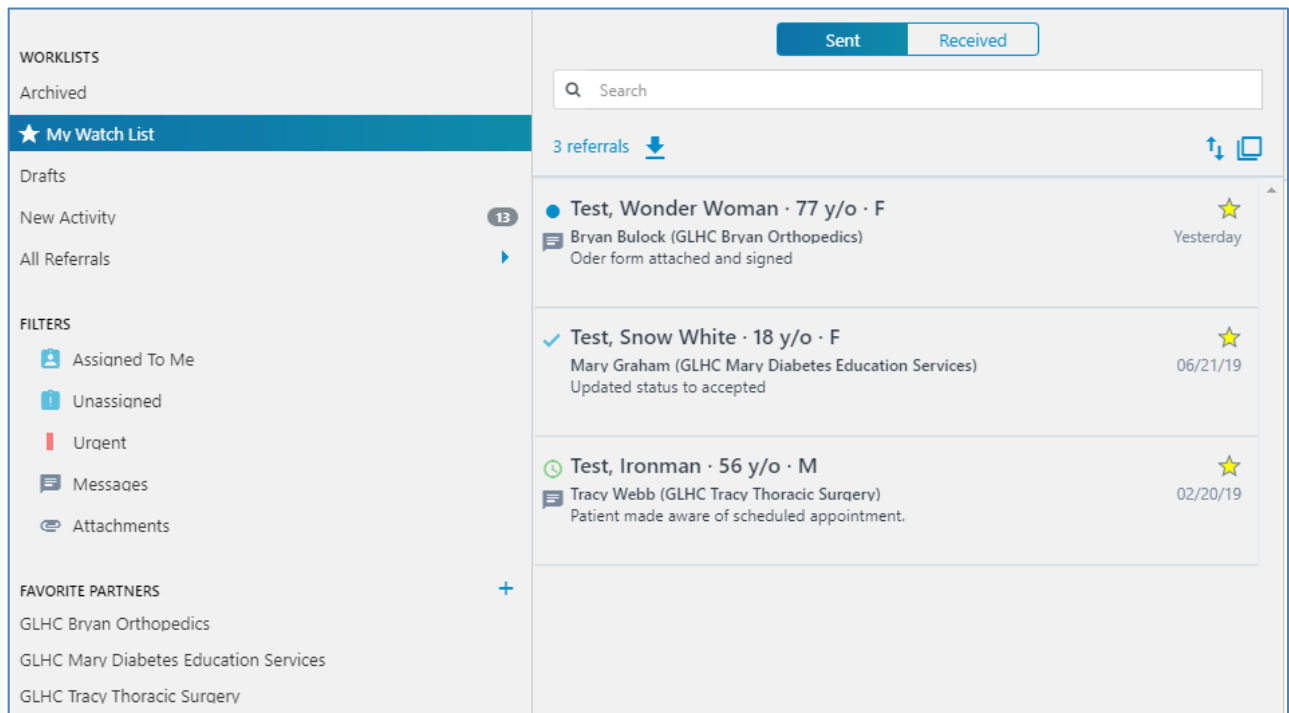Any referral can be added to a user's personal watch list. The Watch List is separate from the "Assign to" function. A referral can be on the Watch List of multiple users, but only assigned to one user at a time.

Add a referral to My Watch List from the main view or from the Large View Worklist – check out the Assigning / Watch List User Guide for more information.

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

Combine the My Watch List view with other filters in the organization panel. For example, you might want to view referrals on your watch list that are also marked urgent.

Drafts

It is common to be in the middle of creating and sending a referral and to then be called away from your desk or to need to complete another task. The GLHC Bridge Referral Application allows users to save the referral and come back to it later to update it and to send it.

A referral can be saved as a draft after a patient and a referring provider have been selected.

Edit a referral draft by clicking "Edit Draft" in the Patient Details area or by clicking the Actions button and then Edit Draft.

New Activity

As referrals are updated, referrals with changes or new messages will be in "New Activity". These updates need to be acknowledged each day, so that important messages or needed actions are not missed.

The number of referrals with new activity is also captured in the Bridge ribbon.
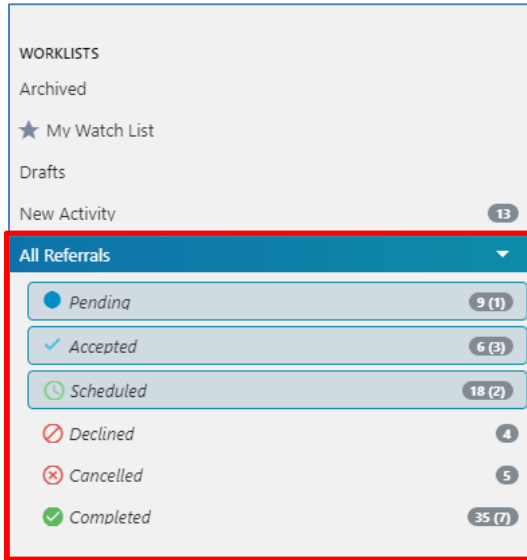
Acknowledging New Activity

To acknowledge the new activity has been read or acted upon, click on the Actions menu and then "Acknowledge New Activity". This will clear the referral from the list of those with New Activity.
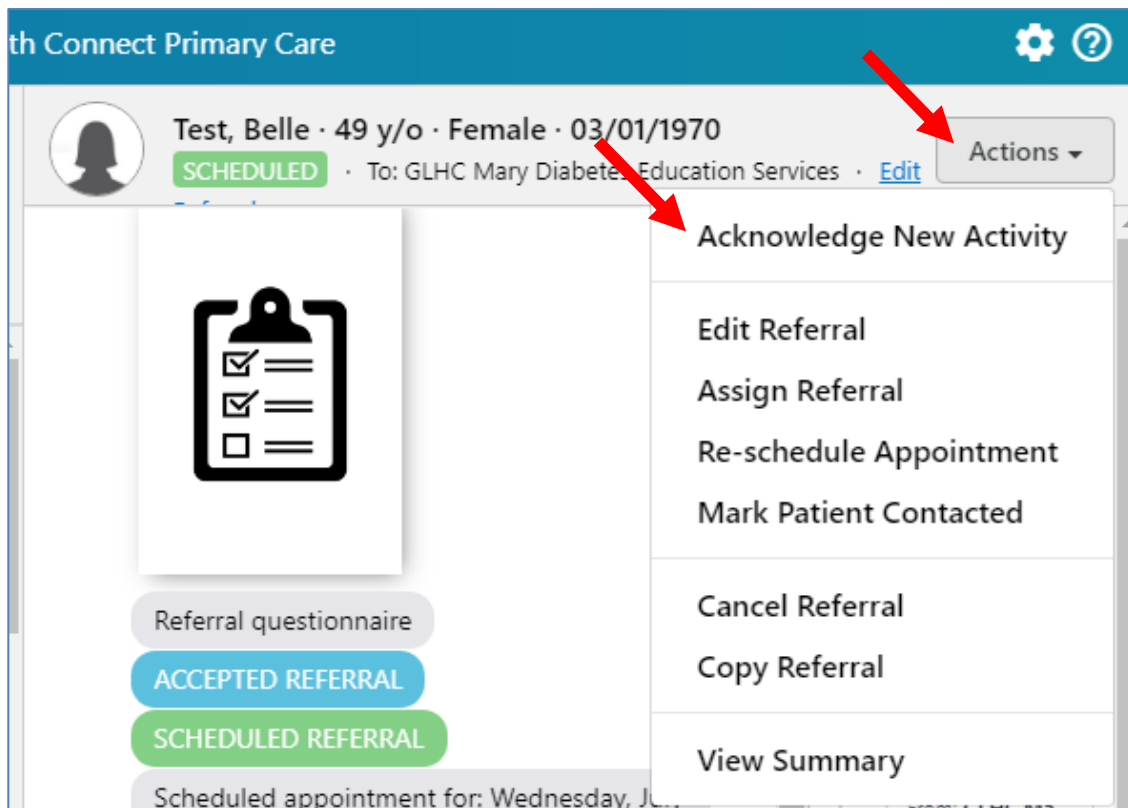
All Referrals

WORKLISTS
Archived
⭐ My Watch List
Drafts
New Activity   `13`

All Referrals   ▼
● Pending   `9 (1)`
✓ Accepted   `6 (3)`
🕐 Scheduled   `18 (2)`
⊘ Declined   `4`
⊗ Cancelled   `5`
✅ Completed   `35 (7)`

This section of the Organization Panel sorts referrals based on their status. The default view is of Pending, Accepted, and Scheduled referrals. The blue highlighting denotes a selected referral. View a different combination of statuses by click on the status to turn it off or on.

Pending

These are referrals that have been successfully sent but the receiving office has not made a decision about the referral.

Accepted

These are referrals that have been accepting by the receiving organization with the intention of seeing the patient and delivering services or care.

Scheduled

These are referrals that have an appointment scheduled.

Declined

The receiving organization has declined these referrals and will not be delivering any services or care.
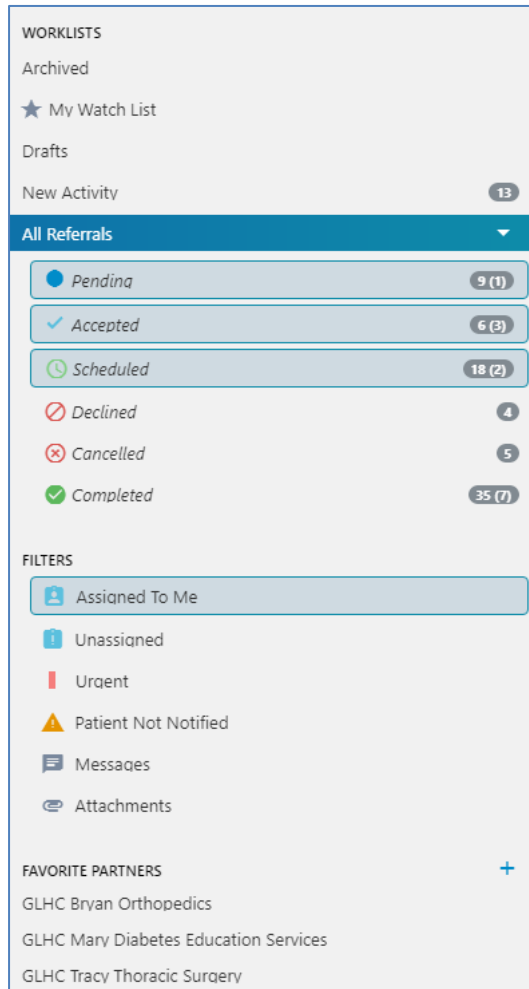
Cancelled

The receiving or sending organization has cancelled these referrals after initially accepting them. Services or care will not be delivered.

Completed

These are referrals where services or care has been delivered to the patient and there is no additional action for the receiving organization to take.

Filters

These filters helps users locate referrals within the Bridge Referral Application. Combine a filter with other worklist options for a narrower list of referrals. Turn a filter on or off by clicking on the name of the filter.

Assigned to Me

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.

For instruction on how to assign, re-assign, and un-assign a referral - check out the Assigning / Watch List User Guide.

Unassigned

These referrals are not assigned to any user in your organization.

Urgent

These referrals have been marked urgent by the sending organization. They have a red line on the left side of the referral in the worklist panel.

Patient Not Notified

These referrals are ones in which the patient has not been notified about a scheduled referral.
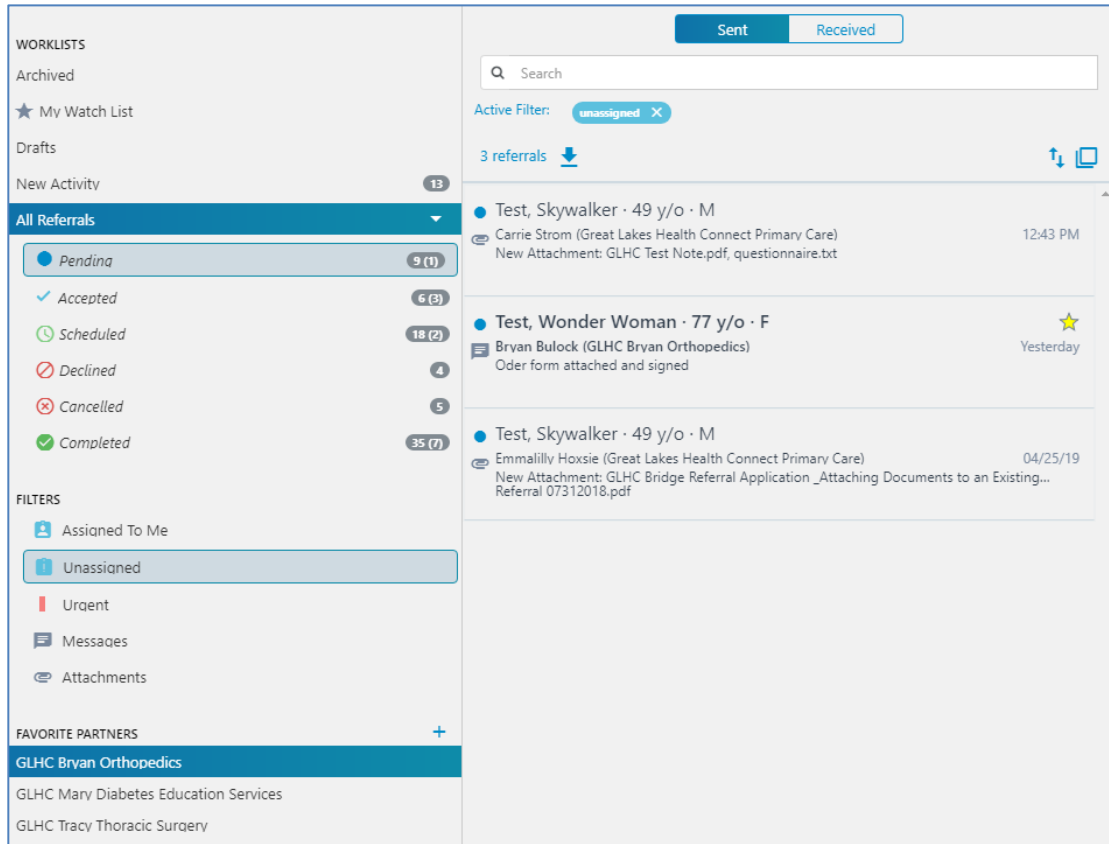
Messages

These referrals have new un-acknowledged messages between the sending and receiving organizations.

Attachments

These referrals have attachments that have been added to the referral after being sent.
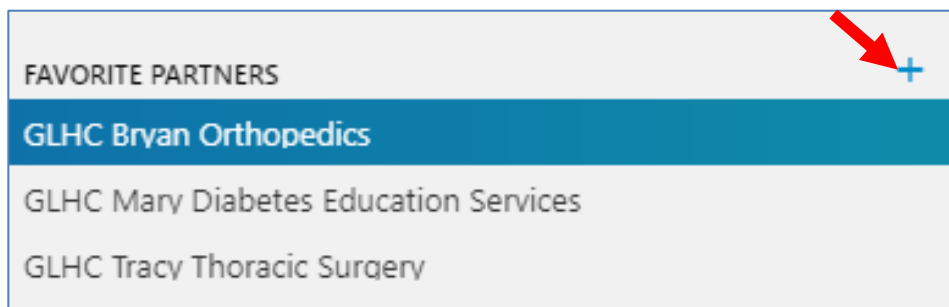
Favorite Partners

This section of the Organization Panel allows users to list organization that are their "favorites". A Favorite Partner can be an organization that you commonly interact with or that is in your network, etc. This list is limited to 10 organizations. Use this filter to view referrals that have a connection to that organization.

Add or Remove a Favorite Partner

To add or remove an organization to the list of Favorites, click the plus sign.

Search for organizations to add them. Uncheck the box to the left of the organization name to remove it from the list. When all changes are complete, click the Save bottom at the bottom of the page.

Add Favorite Partners ✕

Q GLHC

☐ GLHC - Carrie Surgical Specialist

☐ GLHC - Steve Spieker

☑ GLHC Bryan Orthopedics

☐ GLHC Katrina Dermatology

☑ GLHC Mary Diabetes Education Services

☑ GLHC Tracy Thoracic Surgery

Cancel Save