



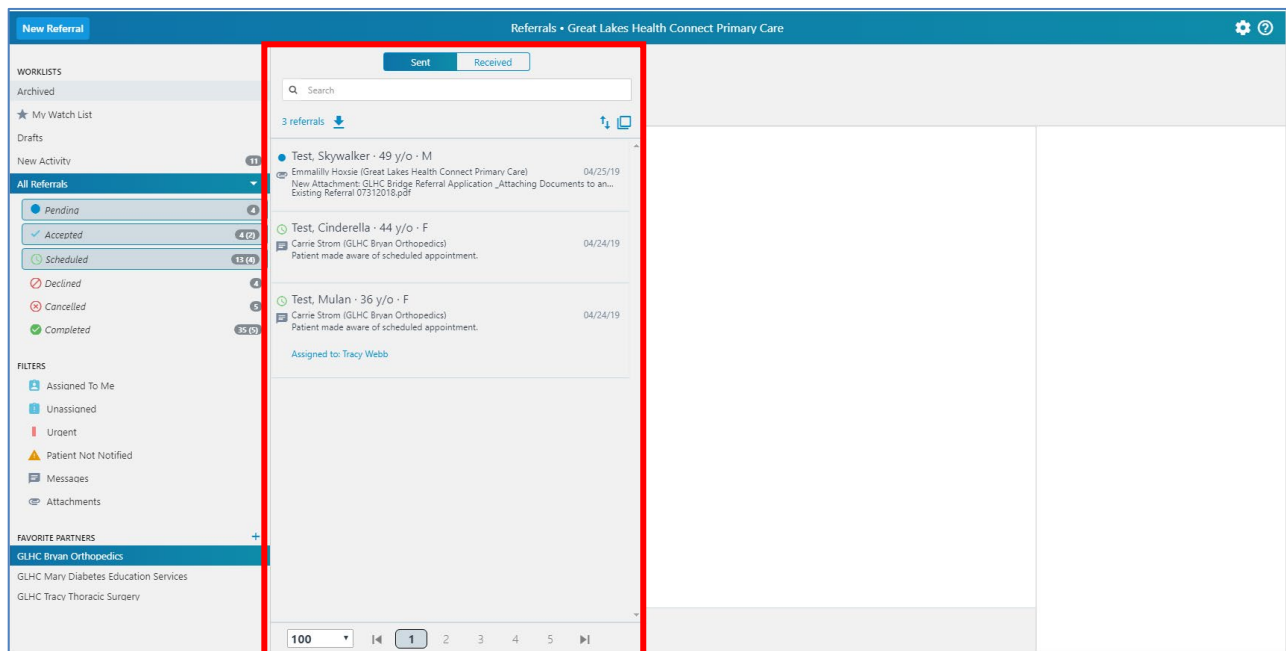
## Referral Worklist Options

### Bridge Referral Application User Guide

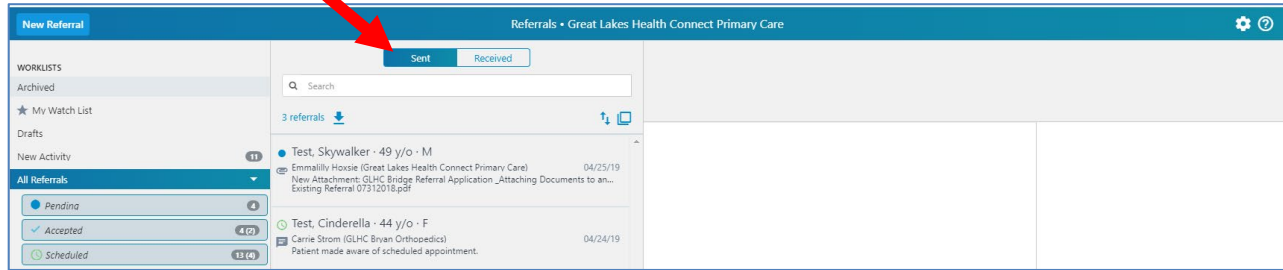
There are many ways to view different groups or batches of referrals within the GLHC Bridge Referral Application. View more information about the individual referrals in certain groups in the worklist panel. Filter, search, sort, and download any worklist for better usability.

### Using the Worklist Panel

1. Open the GLHC Bridge Referral Application.
2. The Worklist Panel is the second section from the left of the GLHC Bridge Referral Application

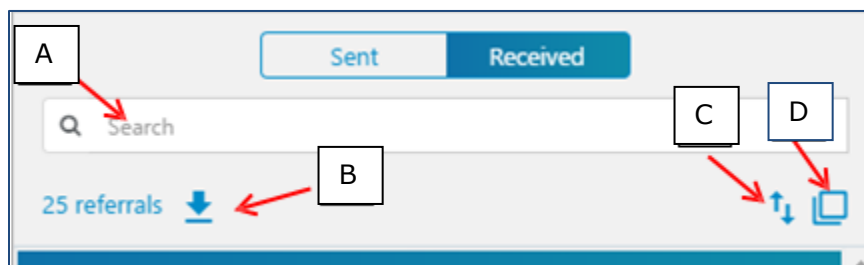


3. Select either **Sent** or **Received** (referrals) at the top of the panel.



4. There are several options at the top worklist panel.

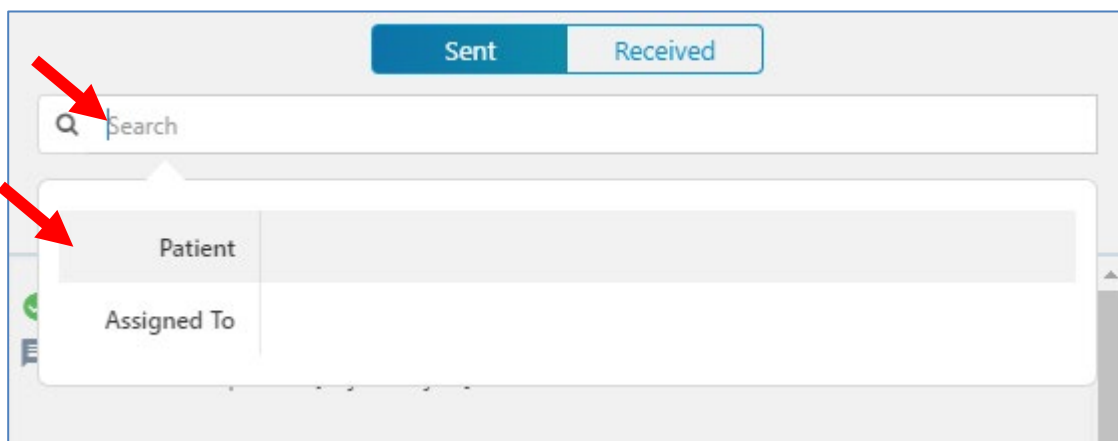
- A. Search
- B. Export/Download
- C. Sort
- D. Large View Worklist



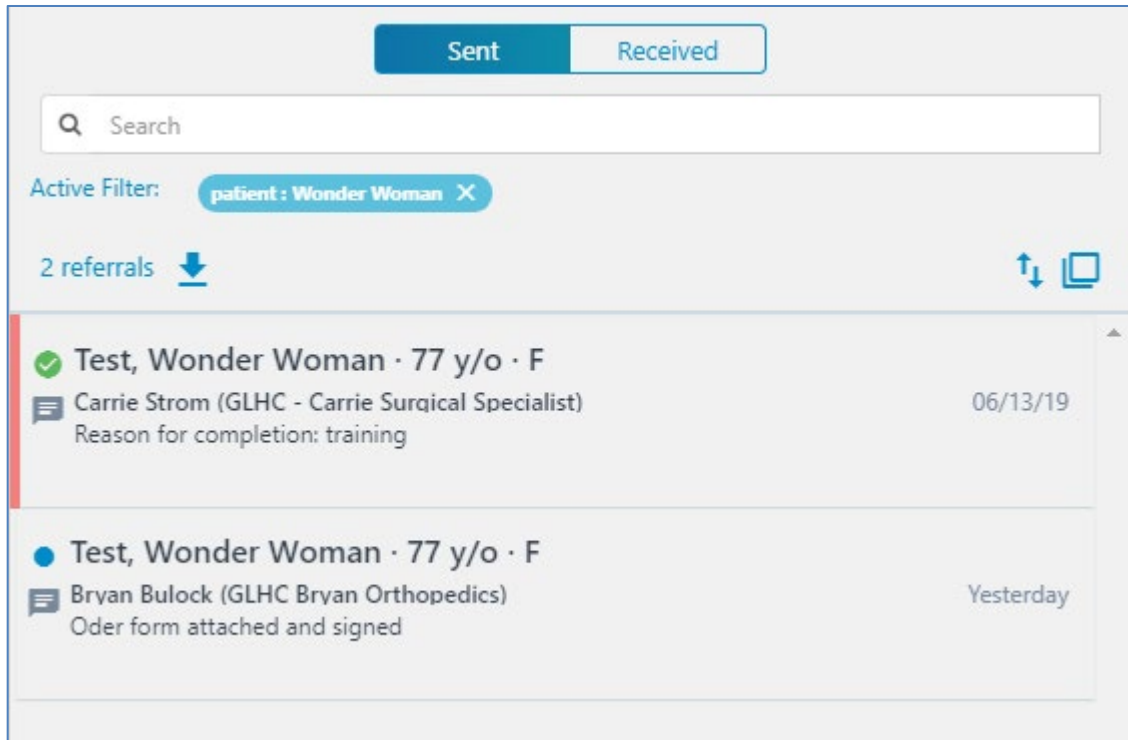
## Search

The **Search** feature looks through the referrals in the worklist for either a matching **Patient** name or for a matching name of the user that the referral is **Assigned To**. The Received worklist also has searching to the organization the patient is **Referred To**,

To **Search**, enter the information (patient name, organization name, or user name) into the search box and then select the appropriate category.

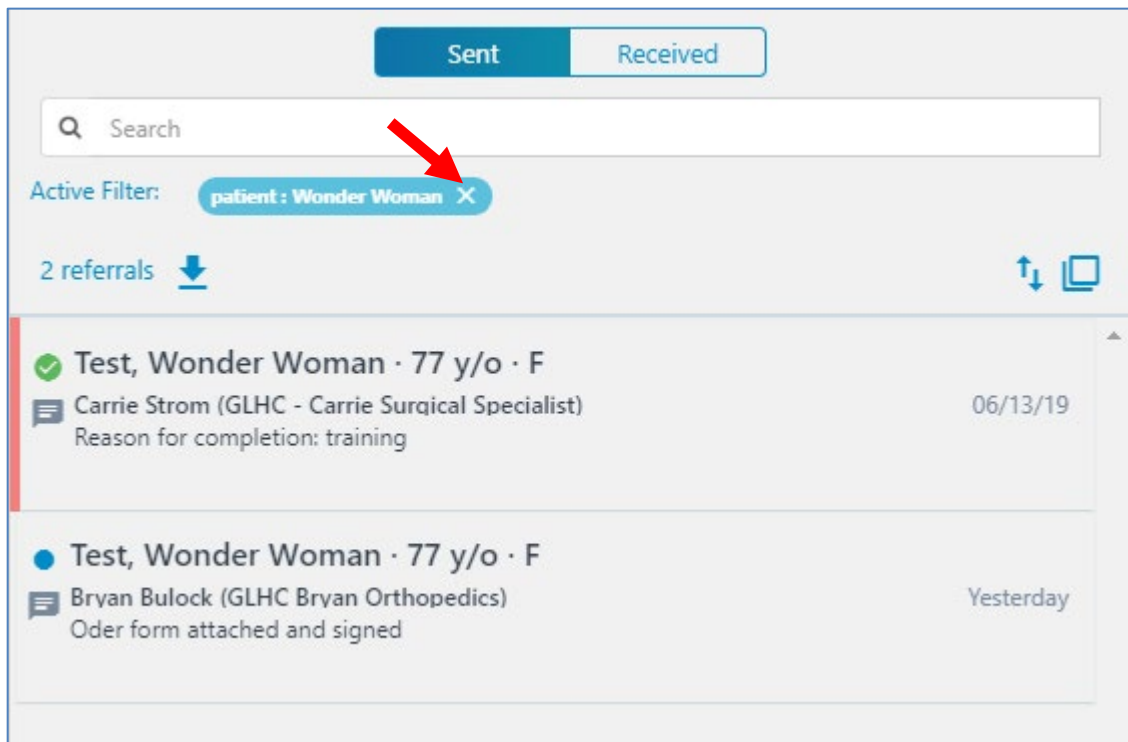


In the following example, the user typed in “Wonder Woman” and selected “Patient”. This returned all referrals in the worklist that have “Wonder Woman” in the patient name.



The screenshot shows a web interface for a referrals worklist. 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 "Active Filter: patient : Wonder Woman X". Below the filter, it says "2 referrals" with a downward arrow icon. To the right of "2 referrals" are two icons: a vertical double-headed arrow and a square icon. The main area contains two referral entries. The first entry is marked with a green checkmark and shows "Test, Wonder Woman · 77 y/o · F" with a date of "06/13/19". The second entry is marked with a blue dot and shows "Test, Wonder Woman · 77 y/o · F" with the date "Yesterday".

To remove a search filter, click select the “x” to the right of the active filter bubble.



This screenshot is identical to the one above, but with a red arrow pointing to the "X" icon on the right side of the "Active Filter: patient : Wonder Woman X" bubble, indicating how to remove the filter.

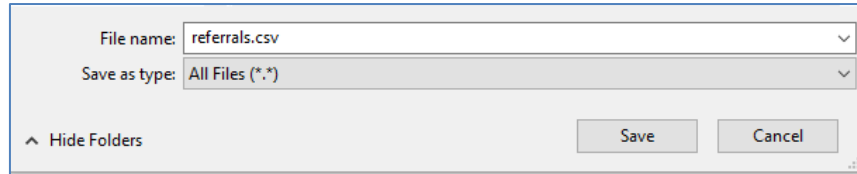
## Export/Download the Worklist



The export/download feature allows the user to view the referrals that are in the selected worklist in a .csv file.

The file will include more information than is displayed in the Referral Application. GLHC recommends using this feature for reporting, not for managing the referral process. Only export worklists of less than 9,999 referrals at a time.

1. When the desired worklist is displaying in the worklist panel, click the export/download button.
2. Select a folder to save the file in. Remember that the document will have PHI in it.
3. Name the file and leave the “.csv” at the end of name. Select “All Files” as the file type.



4. Click **Save**.
5. At this point, some users will need to complete an Import Wizard. This process tells the computer how to divide the data. The data is delimited using tabs and commas. The data within the file is a combination of text, numbers (general), and dates.
6. Open the computer application that you will use to open the file. For many users, this will be Microsoft Excel.
7. At the top of the application, click “File” then “Open”. Navigate to or search for the.csv file just saved.
8. Click on the file and then click open.

## Sort the Referral Worklist



The sort icon is two arrows, one pointing up and the other pointing down. This icon will order the referrals from newest to oldest and from oldest to newest.

To use this feature, use the Referral Status and other filters to view desired referrals in the worklist panel. Second, click the arrows once to reorder the referrals. Additional clicks on the icon will order the referrals in the opposite order.

## Large View Worklist



The icon that opens the Large View Worklist looks like two squares, one on top of the other.

The Large View Worklist is the same group or batch of referrals that are in the Worklist, but displayed in a grid / table view.

#	Patient	DOB	Status	Sent To	Referring Provider	Referred To	Date Referred	Updated	Scheduled	Assigned To User
1	Test, Elsalilly	02/01/2002	PENDING	GLHC Tracy Thoracic Surgery	Peter Parker MD	Anyone	7/9/2018	7/9/2018		
2	Test, Mulan	08/01/1982	SCHEDULED	GLHC Bryan Orthopedics	Peter Parker MD	Anyone	6/25/2018	7/6/2018	7/10/2018 9:00 AM	Bryan Bullock
3	Test, Cinderella	04/01/1975	SCHEDULED	Childrens Healthcare Access Program	Peter Parker MD	Anyone	7/3/2018	7/6/2018	7/19/2018 12:00 AM	
4	Test, Pocahontas	09/01/1995	PENDING	GLHC Mary Diabetes Education Services	Peter Parker MD	Diabetes Prevention Program Team	6/25/2018	7/6/2018		Emmalilly Hoxsie
5	Test, Cinderella	04/01/1975	ACCEPTED	GLHC Bryan Orthopedics	Peter Parker MD	Anyone	6/20/2018	7/6/2018		
6	Test, Ironman	03/01/1963	PENDING	GLHC Tracy Thoracic Surgery	Peter Parker MD	Captain America MD	7/5/2018	7/5/2018		Emmalilly Hoxsie
7	Test, Elsalilly	02/01/2002	ACCEPTED	GLHC Tracy Thoracic Surgery	Peter Parker MD	Anyone	6/28/2018	7/3/2018		

From the Large View Worklist, users can search the list of referrals for any word.

Referral List - SENT

Show 10 entries

Search: Belle

#	Patient	DOB	Status	Sent To	Referring Provider	Referred To	Date Referred	Updated	Scheduled	Assigned To User
8	Test, Belle	03/01/1970	ACCEPTED	GLHC - Carrie Surgical Specialist	Peter Parker MD	Anyone	6/20/2018	6/29/2018		
13	Test, Belle	03/01/1970	ACCEPTED	GLHC Tracy Thoracic Surgery	Peter Parker MD	Anyone	6/21/2018	6/26/2018		

Showing 1 to 2 of 2 entries (filtered from 15 total entries)

Previous 1 Next

All of the column headers can be used to sort the referrals in the Large View Worklist.

Referral List - SENT

Show 10 entries

Search:

#	Patient	DOB	Status	Sent To	Referring Provider	Referred To	Date Referred	Updated	Scheduled	Assigned To User
1	★ Test, Elsa	12/01/2002	COMPLETED	GLHC Katrina Dermatology	Peter Parker	Luke Skywalker	7/25/2018	7/27/2018	8/1/2018 10:30 AM	
3	Test, Batgirl	06/01/1967	COMPLETED	GLHC Mary Diabetes Education Services	Peter Parker	Diabetes Prevention Program Team	7/25/2018	8/1/2018	7/30/2018 3:30 AM	
4	Test, Belle	03/01/1970	ACCEPTED	GLHC Mary Diabetes Education Services	Peter Parker	Diabetes Prevention Program Team	7/25/2018	8/1/2018		
2	★ Test, Batgirl	06/01/1967	COMPLETED	GLHC Tracy Thoracic Surgery	Peter Parker	Anyone	7/30/2018	7/31/2018	8/3/2018 8:40 AM	
10	Test, Aurora	02/01/1965	ACCEPTED	GLHC Mary Diabetes Education Services	Peter Parker	Anyone	8/10/2018	6/25/2019		
9	Test, Belle	03/01/1970	COMPLETED	GLHC Mary Diabetes Education Services	Peter Parker	Anyone	1/28/2019	6/21/2019	3/26/2019 5:59 PM	
7	Test, Batman	01/01/1939	COMPLETED	GLHC Mary Diabetes Education Services	Peter Parker	Anyone	5/9/2019	6/17/2019	6/19/2019 2:26 PM	
5	Test, Wonder Woman	04/01/1942	COMPLETED	GLHC - Carrie Surgical Specialist	Peter Parker	Anyone	6/13/2019	6/13/2019	6/18/2019 10:30 AM	
6	Test, Jasmin	06/01/1985	COMPLETED	GLHC - Carrie Surgical Specialist	Peter Parker	Anyone	6/14/2019	6/14/2019	6/17/2019 11:30 AM	Carrie Strom
8	Test, Snow White	10/01/2000	ACCEPTED	GLHC Mary Diabetes Education Services	Peter Parker	Diabetes Prevention Program Team	6/21/2019	6/21/2019		

Showing 1 to 10 of 13 entries

Previous 1 2 Next

Add any referral in the Large View Worklist to your **Watch List** by hovering your mouse over the grey star, click once and it will turn yellow.

Referral List - SENT

Show 10 entries

#	Patient	DOB	Status
1	★ Test, Elsalilly	02/01/2002	PENDING
2	Add to my list	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