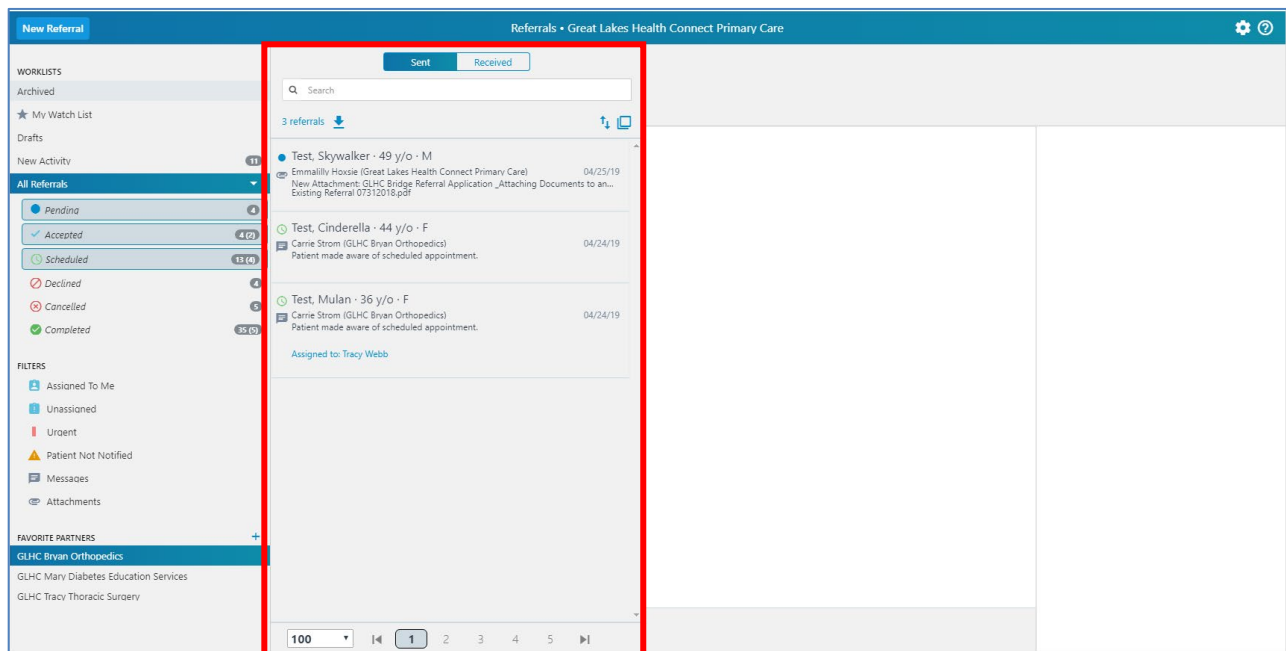# Referral Worklist Options

## Bridge Referral Application User Guide

There are many ways to view different groups or batches of referrals within the 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 Bridge Referral Application.
2. The Worklist Panel is the second section from the left of the Bridge Referral Application
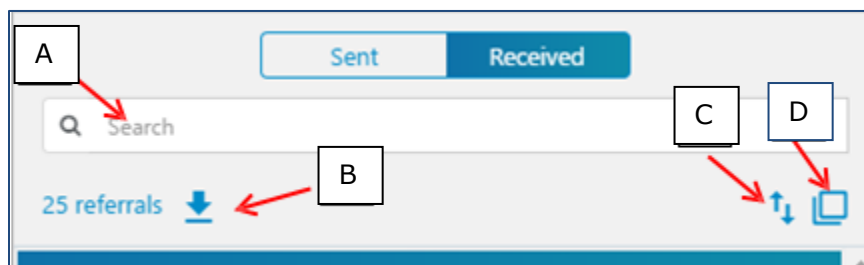
3. Select either **Sent** or **Received** (referrals) at the top of the panel.
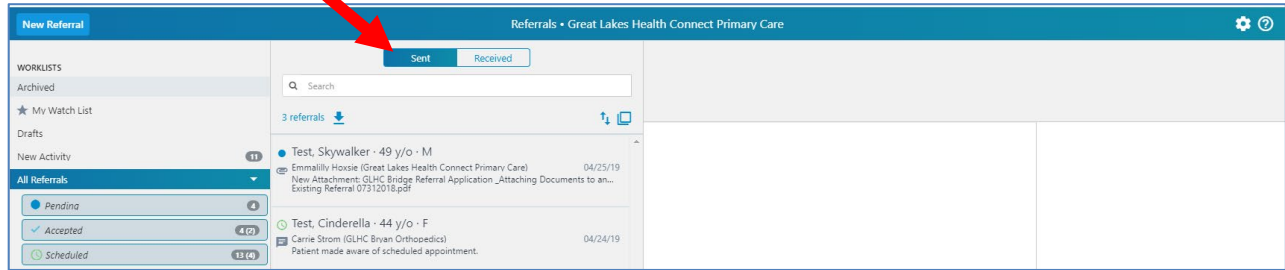


4. There are several options at the top worklist panel.
   - A. Search
   - B. Export/Download
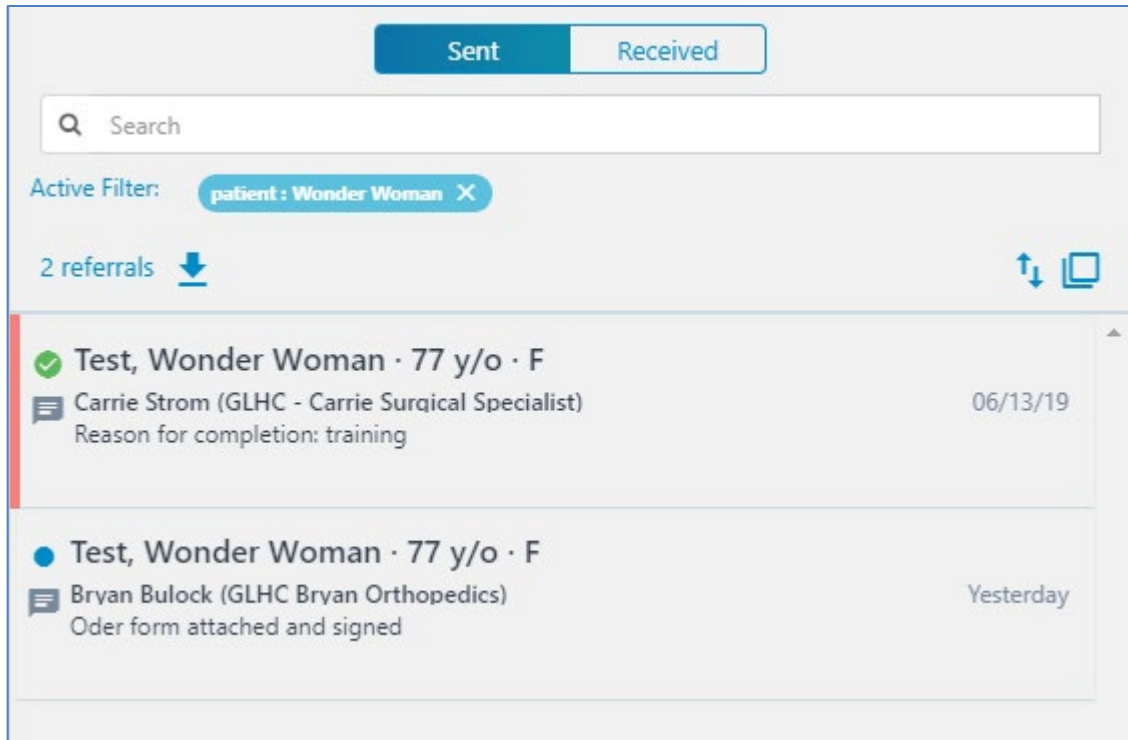   - C. Sort
   - D. Large View Worklist



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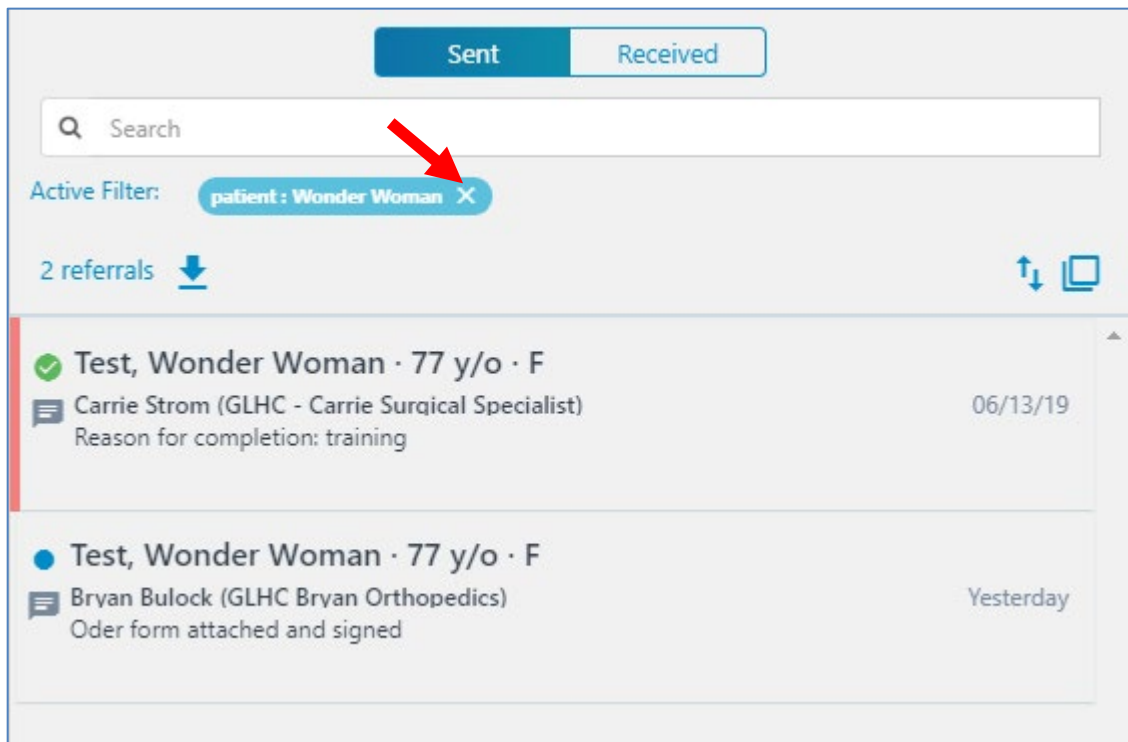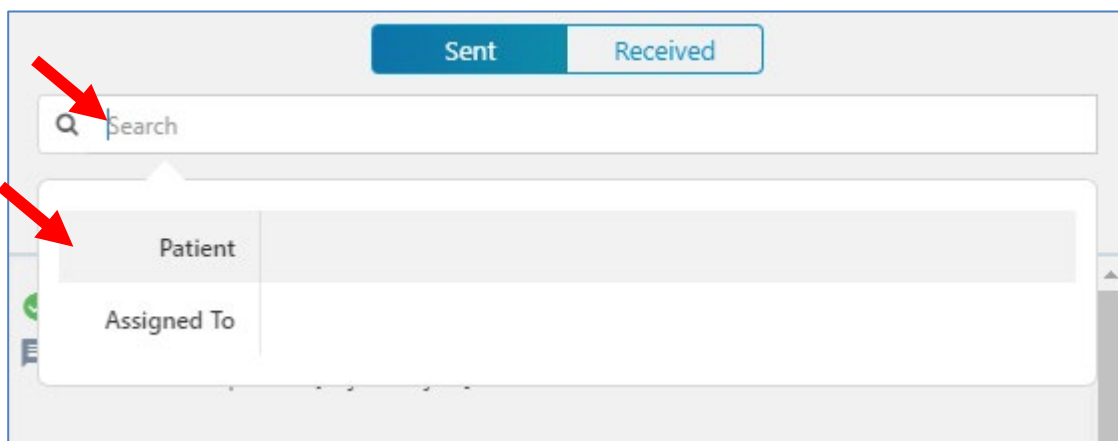
In the following example, the user typed in "Wonder Woman" and selected "Patient". This returned all referrals in the worklist that have "Wonder Woman" in the patient name.



To remove a search filter, click select the "x" to the right of the active filter bubble.
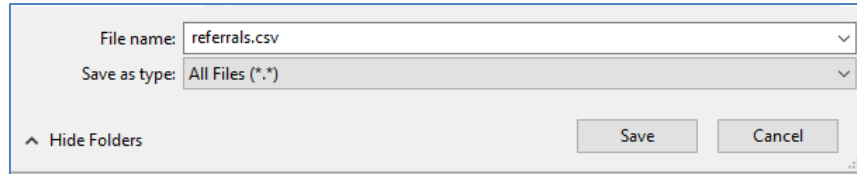
## Export/Download the Worklist

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. We recommend 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.

| | |
|---|---|
| File name: | referrals.csv |
| Save as type: | All Files (*.*) |

∧ Hide Folders      Save    Cancel

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.

**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, 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 Bulock |
| 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 - Carrie Surgical Specialist | Peter Parker MD | Optimus Prime DO | 6/28/2018 | 7/3/2018 | | |

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

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



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.