**QRG**

OMC REFERRAL WORKQUEUE WORK FLOW

* Click the Epic button and select Referrals > Workqueue List
	+ Once you have opened up a menu item, you can create Menu Favorites.
		- *To create Menu Favorites, under Recent, click on the STAR next to Workqueue List. Favorites will now appear at the top of your EPIC drop down menu*
* Double click on the SA 14 NURSE HOME VISITING group
* Sort referrals by Status, Referral Type, or Assigned To by clicking on column header *(See Appendix A if this is the first time in the Workque to standardize columns)*
* Clicked on the Defer column where all New Prenatal Screening clients will be placed prior to being called.
	+ *You will need to sort in the Deferred column as well if this is your first time.*
* Click once on referral to see detail (preview pane, bottom of screen)
* Click on arrow next to **Assign To User**, then **Assign to Self** (or other User)



**Referral Types Legend**

New Prenatal Screening ----> Need to see OMC staff

PN (prenatal) ----> Seen by OMC staff, NHV to contact if unassigned

Babies First ----> NHV to contact if unassigned

CaCoon ----> NHV to contact if unassigned

Care Coordination ----> NHV to contact if unassigned

*NOTE: Click once on referral to see detail (preview pane, bottom of screen) and to Assign to User. Double click to update referral information*

**PREGNANCY**

**INITIAL contact/attempt**

Double click on referral to update record. The **Referral Entry** General screen will now display

General

* Change Status to **Open** *(if not already)*
* Make sure Class is set to **Incoming**
* Click **Next** *(or choose Open Reason from the menu to the left hand side of your screen)*

Dx/Px

* Enter **EDC MM/DD/YY** in free text Diagnosis cell if not already completed
* Enter **Place of Service** *(initials)***, Dr. Name** in free text Procedures cell if not already completed
* Click on **Notes** from the menu to the left hand side of your screen

Notes

* Create new note by clicking **New** in the Notes tab
	+ Choose **Referral Entry Comment** for the Type
	+ Free text notes or use smart phrase **.SA14MCHREFFERALINFO**
	+ Type **Initial** in the Summary section
	+ Click **Accept Note**
	+ Click **Accept** (bottom right of screen)

**FOLLOW-UP contact/attempt**

Double click on referral to update record. The **Referral Entry** General screen will now display

Notes

* Create new note by clicking **New** in the Notes tab
	+ Choose **Referral Entry Comment** for the Type
	+ Free text notes section
	+ Type **Follow up** in the Summary section
	+ Click **Accept Note**
	+ Click **Accept** (bottom right of screen)

**IF DURING A FOLLOW UP OR INITIAL CALL Client has accepted NHV visit**

* Change Ref Type to **PN**
* Follow above instructions for all other updating

**CLOSE REFERRAL**

**REFERRAL NOT CONTACTED**

General

* Change Status to **Denied**
* Change Status Reason to **Forwarded to Healthy Families** or **Due to Capacity Limits**
* Click on **Notes** from the menu to the left hand side of your screen

Notes

* Create new note by clicking **New** in the Notes tab
	+ Choose **GENERAL** for the Type (this is the **ONLY** note type that will print in the Referral printout-**no other notes will be included**)
	+ Type free text or use smart phrase **.SA14MCHREFERRALNOTE** in the notes section
	+ Type **Final** in the Summary section
	+ Click **Accept Note**
	+ Click **Accept** (bottom right of screen)

 Letters

* Use OCHIN letter template SA14 MCH OUTCOME RESPONSE letter to fax referral outcome to referring provider as needed.

**Client NOT engaged in NHV services, no initial visit**

General

* Change Status to **Closed**
* Change Status Reason to **Phone Contact** **Refused Service, No contact, or Unable to Locate**
* Click on **Notes** from the menu to the left hand side of your screen

Notes

* Create new note by clicking **New** in the Notes tab
	+ Choose **GENERAL** for the Type (this is the **ONLY** note type that will print in the Referral printout-**no other notes will be included**)
	+ Type free text or use smart phrase **.SA14MCHREFERRALNOTE** in the notes section
	+ Type **Final** in the Summary section
	+ Click **Accept Note**
	+ Click **Accept** (bottom right of screen)
		- Fax/send print out to referral source *(the ability to fax through RightFax is in process)*

 Letters

* Use OCHIN letter template SA14 MCH OUTCOME RESPONSE letter to fax referral outcome to referring provider as needed.

**FIND CLOSED REFERRALS**

* Click the Epic button and select Referrals > Referral Entry
* Click on Custom Search tab
* Type in Search parameters
* Click Search

*Appendix A*

In the Workque click on Column Action

Then click on Column to standardize Workque columns



Delete all items not listed below by unchecking the box. Move up or move down to order Column by using the **Move Up** and **Move Down** buttons

The list should be as follows…

* Age of Referral
* Assigned to User
* Ref Type
* Creation Date
* Patient
* Diagnosis (Free Text)
* DOB
* Ref-By-Pro
* Age: Years
* Procedure (Free Text)
* Plan Name
* PCP
* Language
* Note?