Niagara Health System

Nov 08, 2024

Future State: Ambulatory - Referrals (Originating)

Cerner Workflow ID: **10182 (v. 7.0)**   Client Workflow ID: **1006**   Last updated by **Lezlie Leduc, May 02, 2024 1:29pm (UTC -5 hours)**

Swimlane 1 (rows 1–2): Ambulatory Nurse,Ambulatory Prescriber,MHA IP Nurse,Allied Health,Addictions Counsellor,psychotherapist

Start/Stop	Work Step PowerOrders	Work Step PowerOrders
Patient requires referral to specialty or special services [17480]	Select order for Referral [17478]	Select Referral Specialty (medical service) from drop down in Order Details [17479]

Work Step PowerOrders	Work Step PowerOrders	System
Free text the "Reason for Referral" in the Order Details [17515]	Fill in additional details including requested start date, provider or practice, urgency, special instructions, treatment to date. [17543]	Referral order will generate a Referral Case on the referral management worklist [17530]

Swimlane 2: Ambulatory Nurse,Social Worker,Ward Clerk,Occupational Therapist,Allied Health,Addictions Counsellor

Work Step	Work Step	Work Step
Access Referral Case from the appropriate outbound queue from Referral Management [17586]	Select Start Referral to start the process of measuring throughput of the case [17588]	Review referral case details. Select edit to add more details [17590]

Work Step	Work Step	Work Step
Select provider/practice from the Referral Directory to send the case [17602]	Associate appropriate documentation from the visit to the case [17594]	Associate the appropriate insurance for the referral to the case [17592]

Work Step	Decision
When the case has all of the appropriate documentation select "Generate" [17608]	Is this Referral external? [17619]

Yes → / No →

Start/Stop	System	System
Manually update statuses as you receive communication regarding case acceptance, patient scheduling, and note completion [17623]	Referral will send out via direct, via fax, or print for scheduling and the referral appointment. [17610]	Referral will send to an inbound queue [17621]

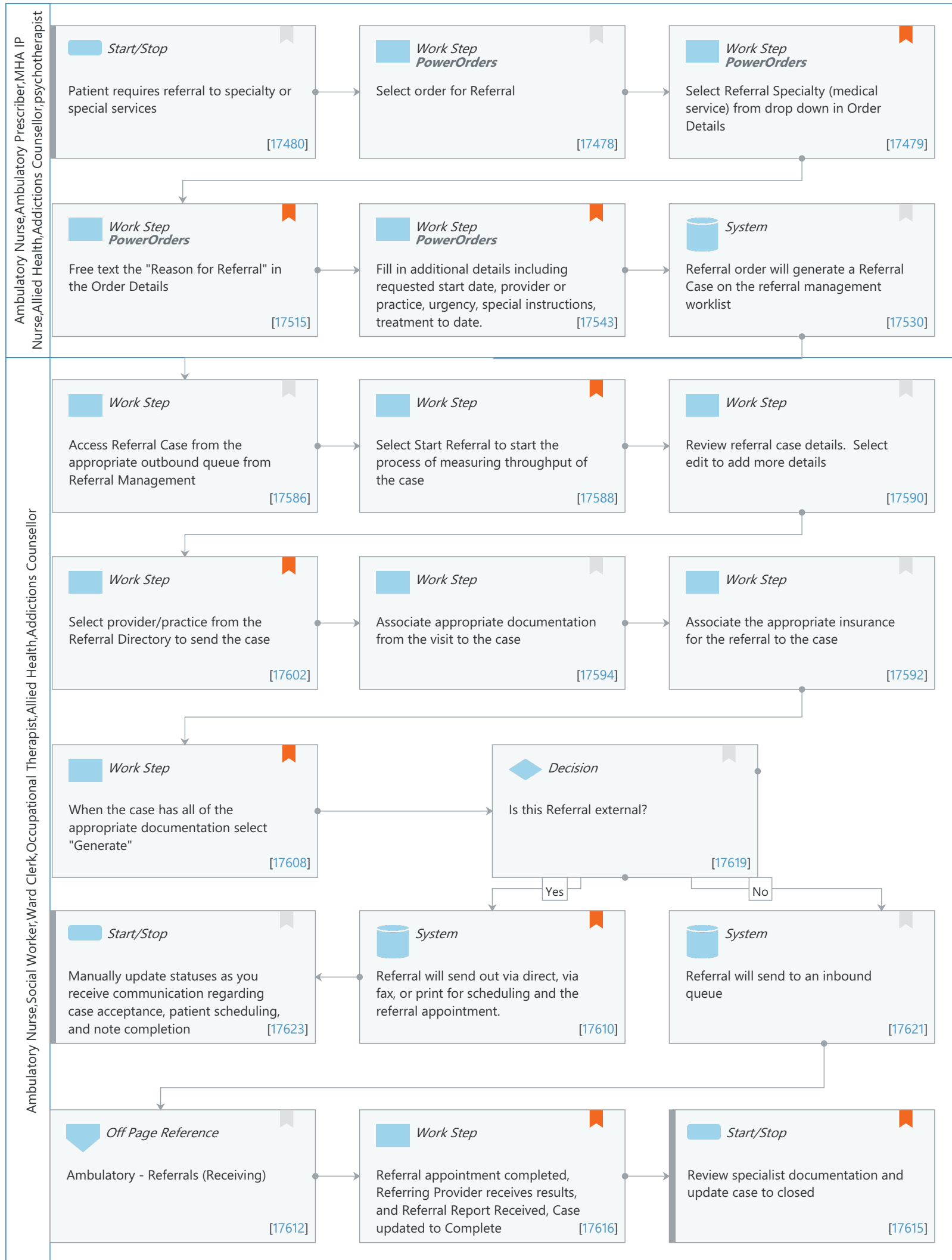| Off Page Reference	Work Step	Start/Stop
Ambulatory - Referrals (Receiving) [17612]	Referral appointment completed, Referring Provider receives results, and Referral Report Received, Case updated to Complete [17616]	Review specialist documentation and update case to closed [17615]

Future State: Ambulatory - Referrals (Originating)

Cerner Workflow ID: 10182 (v. 7.0)   Client Workflow ID: 1006   Last updated by Lezlie Leduc, May 02, 2024 1:29pm (UTC -5 hours)

Workflow Details:

Workflow Name: Ambulatory - Referrals (Originating)
Workflow State: Future State
Workstream: Orders
Venue: Ambulatory
Client Owner:
Cerner Owner:
Standard: Yes
Related Workflow(s):
Tags:

Workflow Summary:

Service Line:
Related Solution(s): Cerner Millennium EMR - Ambulatory
Cerner Oncology
Project Name: Niagara Health System:OPT-0297674:NIAG_CD Niagara HIS RFP
TestBuilder Script(s):
Cerner Workflow ID: 10182 (v. 7.0)
Client Workflow ID: 1006
Workflow Notes: Standard Build:
-Orders
(Model Experience>Model Experience Foundation>Depts & Capabilities>
Order Management)
Introduced By: WS 4
Validated By: WS 8

Swim Lane:

Role(s): Ambulatory Nurse
Ambulatory Prescriber [Custom]
MHA IP Nurse [Custom]
Allied Health [Custom]
Addictions Counsellor [Custom]
psychotherapist [Custom]
Department(s):
Security Position(s): Nurse Practitioner
Nurse
Social Worker
Occupational Therapist

Future State: Ambulatory - Referrals (Originating)

Cerner Workflow ID: 10182 (v. 7.0)   Client Workflow ID: 1006   Last updated by Lezlie Leduc, May 02, 2024 1:29pm (UTC -5 hours)

Start/Stop [17480]

Description: Patient requires referral to specialty or special services

Work Step [17478]

Description: Select order for Referral

Method: PowerOrders

Work Step [17479]

Description: Select Referral Specialty (medical service) from drop down in Order Details

Method: PowerOrders

Comments: Medical service is a required field

Work Step [17515]

Description: Free text the "Reason for Referral" in the Order Details

Method: PowerOrders

Comments: Reason for Referral is a required field.

Work Step [17543]

Description: Fill in additional details including requested start date, provider or practice, urgency, special instructions, treatment to date.

Method: PowerOrders

Comments: Provider or Practice is added in the Refer to field

More specifics to the domain
can be added depending on there specifics that need called out.

System [17530]

Description: Referral order will generate a Referral Case on the referral management worklist

Swim Lane:

Role(s): Ambulatory Nurse
Social Worker
Ward Clerk [Custom]
Occupational Therapist
Allied Health [Custom]
Addictions Counsellor [Custom]

Department(s):

Security Position(s): Nurse
Social Worker

Future State: Ambulatory - Referrals (Originating)

Scheduling - Clerk
Occupational Therapist

Work Step [17586]

Description: Access Referral Case from the appropriate outbound queue from Referral
Management

Work Step [17588]

Description: Select Start Referral to start the process of measuring throughput of the case

Comments: Case status automatically updates to Prepare Send

You can add sub status for
information by clicking on edit

Referral can be assigned to a person reviewing.

Work Step [17590]

Description: Review referral case details. Select edit to add more details

Work Step [17602]

Description: Select provider/practice from the Referral Directory to send the case

Comments: If not already selected within the ordering process.

You can send to a location
if you don't want to send to a provider.

Work Step [17594]

Description: Associate appropriate documentation from the visit to the case

Work Step [17592]

Description: Associate the appropriate insurance for the referral to the case

Work Step [17608]

Description: When the case has all of the appropriate documentation select "Generate"

Comments: .

Decision [17619]

Description: Is this Referral external?

Cerner Workflow ID: **10182** (v. 7.0)   Client Workflow ID: **1006**   Last updated by Lezlie Leduc, May 02, 2024 1:29pm (UTC -5 hours)

Start/Stop [17623]

Description: Manually update statuses as you receive communication regarding case acceptance, patient scheduling, and note completion

System [17610]

Description: Referral will send out via direct, via fax, or print for scheduling and the referral appointment.

Comments: When you select Generate it will take you through to a provider letter.

When you select Generate the system will go through a hierarchy of business logic to determine how to send the
referral outbound. This is all based on the Directory build. If the provider is associated to a Win32 or RCA practice site the referral case will automatically route to the inbound queue for that location or provider. Next, if the provider has a direct address associated then the Referral will go out via the direct address. The next step in the logic looks for a Fax Number to send out via RRD. If none of these exist you will be prompted to Print. For Direct, Fax and Printing you'll also be prompted to generate a provider letter that will pull in all of the Referral Details.

System [17621]

Description: Referral will send to an inbound queue

Off Page Reference [17612]

Workflow Link: Ambulatory - Referrals (Receiving)

Work Step [17616]

Description: Referral appointment completed, Referring Provider receives results, and Referral Report Received, Case updated to Complete

Value Impact: Quality

Start/Stop [17615]

Description: Review specialist documentation and update case to closed

Comments: If Referral is sent externally to millennium all status' will need to be updated by originating team