

Incoming Workqueue Management for Referrals

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Incoming Workqueue Management for Referrals H₂O Session Outline

- 1. Challenge Clumsy referral process
- 2. Outcome Incoming Workqueue Management for Referrals
- 3. Process Identify, develop, pilot and deploy the new model
- 4. Learning Objectives
 - o Explore continuous process improvement tools used to identify opportunities in the Authorizations department.
 - o Learn how Aspirus transitioned "referrals to be scheduled" away from Authorizations in order to improve the patient experience.

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Incoming Workqueue Management for Referrals Challenge – Clumsy Referral Process

Provider places referral in Epic.	Patient indicates their preferred date, time and location.	Receiving office contacts patient to obtain additional information regarding appointment.	
Patient leaves their appointment and awaits a follow up phone call.	Referral Coordinator calls receiving location to request preferred day, time and location.	Patient calls receiving office if appointment needs to be scheduled.	
Referral Coordinator contacts patient to notify them of referral.	Referral Coordinator calls patient to inform them that appointment was scheduled and	Referral Coordinator obtains authorization from insurance	

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Staff Engagement

- Involved staff in the development of new processes
- Offered opportunities to learn new skills

Training

- Completed training just-in-time
- Provided basic referral training to Medical Reception and Scheduling staff
- Educated Providers on where to view referral progress

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...but wait! There's still more to come!

- 1. Allow referral scheduling in MyChart
- 2. Transition teams to a functional model
- 3. Consider open scheduling for select departments

Additional opportunities to refine our teams and work:

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