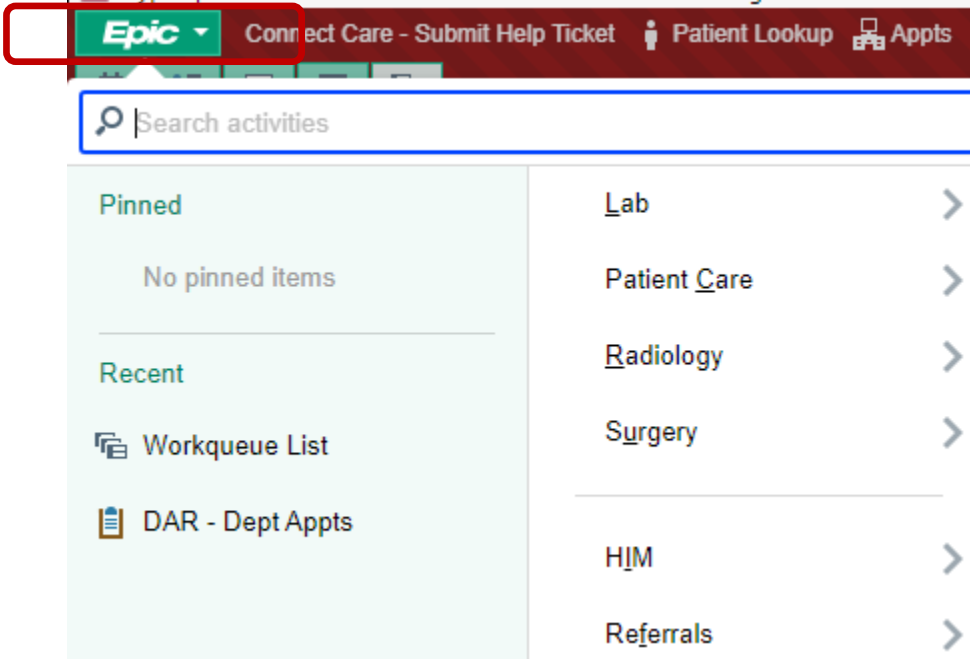


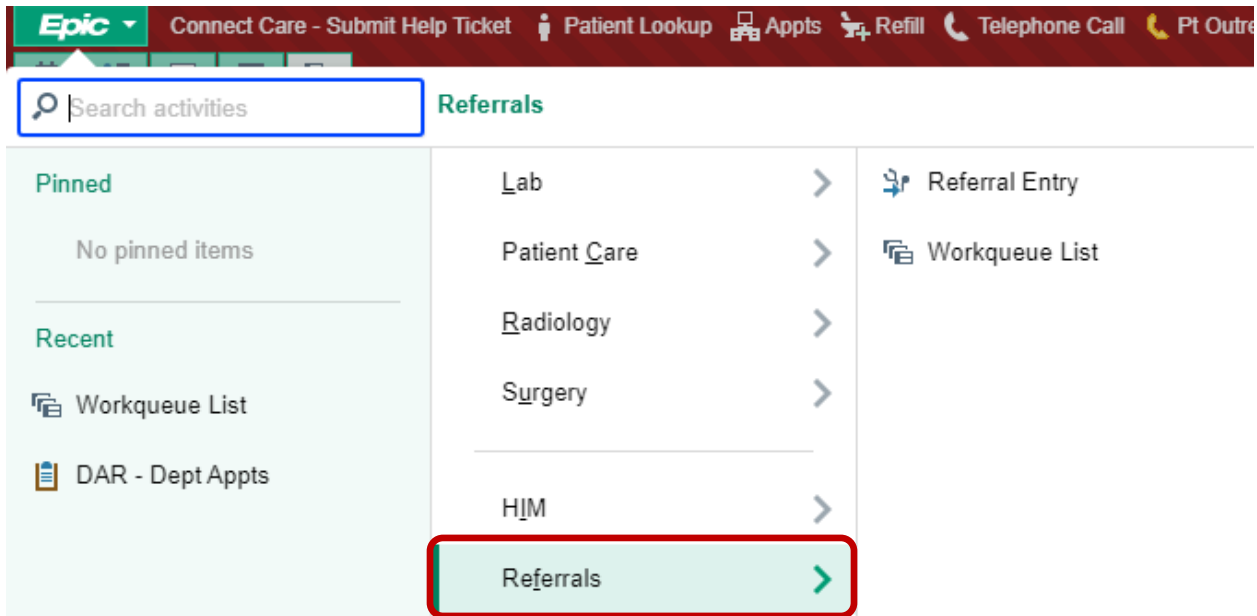
# DIP Triaging Guidelines

## Adding Workqueues

1. Click on the down arrow on the Epic Button in the top left corner of your Epic Tool Bar.

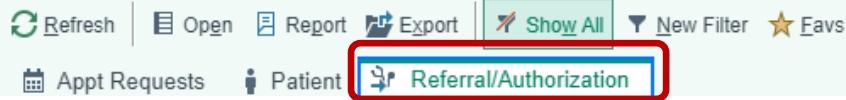


2. Find referrals and click on the right arrow



3. Click “Workqueue List” [One time set-up: Click on the thumb tack to pin this option to your Epic toolbar. Afterwards, you can access the Workqueue list directly from the toolbar]
4. Click on “Referral Authorization”

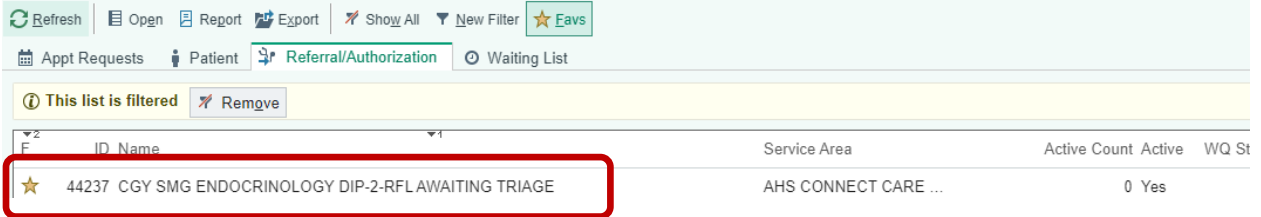
### Workqueue List - Referral/Authorization - Showing All Workqueues



Use “CTRL F” and enter in the name of the triage workqueue for your clinic. Enter the name of the department you need to triage for (i.e., CGY FMC Endocrinology DIP, CGY SMG Endocrinology DIP etc). Once you find this, look for the workqueue with “2-RFL Awaiting Triage” after the department name (All DIP Educators will be triaging from Workqueue 2 – Awaiting Triage).

5. Click the “star” icon beside the correct workqueue. Clicking this will turn the start yellow and “favorite” the workqueue.

### Workqueue List - Referral/Authorization - Favorites



6. Each time open your Workqueue List, it will be in your favorites.
7. If the Workqueue does not show up on your Epic Tool Bar, click the down arrow under “More”. You can drag and drop the “Workqueue” into your epic tool bar or continue to access it by clicking the down arrow under “More”.

## Triaging

1. Click on “**Workqueue Lists**” in the Epic toolbar. Your favorited WQs will show up by default.
2. **Single-click** on a patient to see basic information about the patient which may include referred by provider, appointments, provider comments and referred to provider.

Referral/Authorization Workqueue EDMONTON ZONE DIABETES CAT-2-RFL AWAITING TRIAGE [34612] Last refresh...

Active (Total: 312) Deferred (Total: 0)

Ref ID	Priority	Ref On Date	Sched By	Referred Name	DOB	Age	Sex	Ref By	Ref To	Ref To Dept
8221	Routine	04/02/2021		ACHILLES, HALEY-AMBMD	25/05/1947	75	F	AMB REFERRAL TO...	URGENT, JIM	EDM MCH DIAI
8225	Routine	04/02/2021		AEGEA, HALEY-AMBMD	25/05/1947	75	F	AMB REFERRAL TO...	URGENT, JIM	EDM MCH DIAI
8229	Routine	04/02/2021		AENEAS, HALEY-RUR	25/05/1947	75	F	AMB REFERRAL TO...	URGENT, JIM	EDM MCH DIAI

ACHILLES, HALEY-AMBMD MRN: 1000280527  
Referral/Authorization: 8221  
Auth #: Precert #: Auth Status: Pending Review Reason: Pending Triage

**Workqueue Information** (1)  
Error Message  
Triage Decision has not been set to Accept or Reject

**Referred By**

Provider	Department	Location	Phone
Jim Urgent, MD	Edm Uah Wmc 3e2 General Surg	EDM WMC University of Alberta Hospital	

**Workqueue Notes** (0)  
None

**Provider Comments** Expand All Collapse All  
4/2/2021 9:38 AM MST

Provider Comments  
Entered by Achilles, Ashley-Ambmd  
Patient's Current Status  
Worsening

**Referred To** (OUT OF NETWORK)

Provider	Department	Vendor	Location	POS Type	Phone
Ashley-Ambmd	Edm MCH Diabetes				
Achilles, MD					

**Appointments** (0)  
None

**Procedures** (1)

Description	Rev. Code	Mod.	Provider	Appr/Req
REF22 - AMB REFERRAL TO ENDOCRINOLOGY			Ashley- Ambmd Achilles, MD	1 / 1

**Diagnoses** (0)  
None

3. **Double-click** to open the patient's WQ.
4. On the left-hand side you will see a column of options including the following: General, Referred by/to, Diagnosis, Services, Communications, Scheduling, Appointment List, Flags, and Summary  
The following columns will be important:
  - **General**
  - **Referred by/to**
  - **Communications**

**Referral for Achilles, Haley-AMBMD**

Print on Accept |  Adj Trace |  View History |  Chart |  Triage |  In Basket Msg |  Appt Desk |  View Notes |  WQ Summary |  Print All Notes | More ▾

Age: 75 yrs | DOB: 25/5/1947  
 Gender Identity: Female | Admin Gender: Female [1]  
 MRN: 1000280527 | Insurance: MEDICARE / MEDICARE PART A AND B

**General** | Referred By/To | Authorization | Diagnoses | Services | Communications | Scheduling | Appointment List | Flags | Summary | Linked Waiting List | Linked Admin Pa...

**General**

Referral #  | Type  | Priority  | Class

Referral Reason

**Referral Status**  
 Status  | Pend Reason  |  Auto Assign  
 Last Updated: 4/2/2021

**Dates**  
 Received On

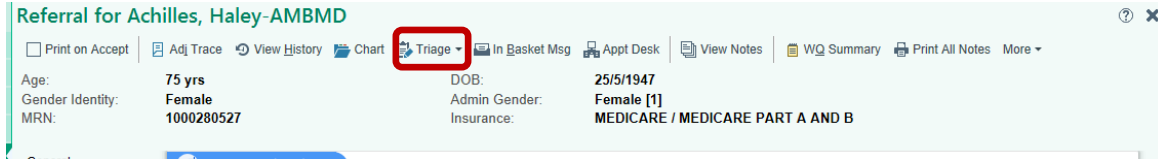
|  |

5. Review the **“General”** section to find the following information:
  - a. “Priority”
  - b. “Reason for Referral”
  
6. Next, look at the **“Referred by/to”** to see the referring MD and location of their clinic
  
7. Review the **“Communications”** tab. Scroll down in the History. There may be multiple entries. If the referral is coming from a CC site, there will be a note in one of the communications as to the reason for the referral. If the referral is from a non-CC site, look for the entry that has a “referral attachment”. Single click on the attachment icon to open the referral.
  
8. After reviewing the referral, you may consider reviewing lab results. This can be done by clicking **“Chart”** at the top and accessing Netcare from the patient’s storyboard.
  
9. Educators can consider referring to Soprano as well to review any historical information
  
10. Once a referral has been reviewed, before triaging, consider returning to the **“General”** Section and Changing the **“Reason for Referral”** if inputted incorrectly.

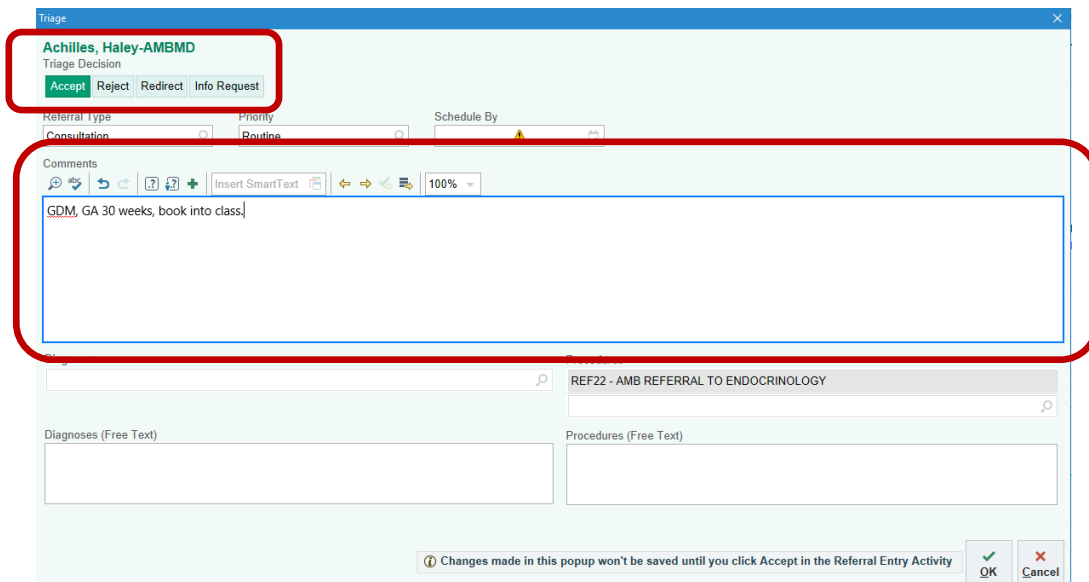
## Accepting a Referral

If a triage decision can be made and the referral is to be accepted, follow the steps below:

1. Click on the “**Triage**” icon (at the top). Click “**Accept**”.



2. Change the “**Priority**” if needed (i.e., routine, semi-urgent, urgent). There is also a “**Scheduled By**” date that is used by some DIP clinics.
3. In the “**Comments**” section use the smart phrase **.DIPCTRIAGEACCEPT** and edit the smart phrase as needed



4. Consider entering the diagnosis in the box “**Diagnosis (Free Text)**” found in the bottom left-hand corner.



5. Click “**OK**”
6. Click “**ACCEPT**”

## Declining a Referral

If a triage decision can be made and the referral is to be declined, follow the steps below:

2. Click on the “**Triage**” icon (at the top). Click “**Reject**”.

3. In the window that opens, select reject reason: “**CRITERIA NOT MET**”

3. In the “**Comments**” use the smartphrase: **.DIPCTRIAGEDECLINE** and chose the reason(s) from the list. (Note: a letter will be automatically generated to be sent to the referrer, which will include your comments. This letter will be sent by clerical).

Triage Decision

Accept **Reject** Redirect Info Request

Reject Reason

Criteria Not Met

Comments

.DIPCTR

Diagnoses

Procedures

REF20 - AMB REFERRAL TO DIABETES EDUCATION

Diagnoses (Free Text)

Procedures (Free Text)

Changes made in this popup won't be saved until you click Accept in the Referral Entry Activity

OK Cancel

### **DIP Triage Considerations**

1. Determine DIP Location Requested (contact referring MD if any questions about location request). If referral has been received by incorrect DIP, redirect to correct clinic.
2. Calculate Current Gestational Age
3. Rule out urgent referrals which may include (but is not limited to the following):
  - Pregnant patient with Type 1 or Type 2 Diabetes
  - Fasting BG  $\geq$  7.0 mmol/L or A1C  $\geq$  6.5%
4. If an A1C has been drawn and the value is 6.1-6.4%, determine if the A1C was a preconception value, or drawn during pregnancy.
5. Review lab work for diagnostic screening of GDM (i.e., screen +/- OGTT) and confirm accurate timing of screen +/- OGTT.
6. Review referral and netcare/connect care to determine if patient is currently prescribed any antihyperglycemic agents?
7. Review Prenatal Reports (consider information that may indicate need for 1:1 vs class: i.e., language barrier, eating disorder, psychological concerns, lack of internet and/or device etc).
8. Based on information determine if this can be triaged without endocrinology involvement, urgency of referral and most appropriate appointment type
9. If referral does not meet DIP triage criteria, contact the endocrinologist (based on site protocol) to discuss case.