MAY 14, 2025

# Queuing Orthopedic Referrals

**CENTRAL INTAKE** 



## Managing the Queue to Book the Specialist Appointments

1. Within the Central Intake solution, access **Referral Management**. Click **W1- Ready for queuing – Specialist Appointment** link.



2. Within the queuing screen, the list displayed is focused on those referrals with a status = Accepted & Prioritized for Consult. You may filter the list for a specific zone, specialist, reason(s) for referral, potential diagnosis, priority, Last Name or MCP. The Triage Consult Specialist drop down list allows you to select 1 or more specialists to filter.

Filters   Stat	tus: Accepted &	Prioritized for Consu	lt								Metri	Parameters			Referral	Count (Curr	ent Filter)	: 91
Triage Consult Eastern Urb	Zone an	Triage Consult Spe Au, Keegan, Dr	cialist ;Croft, Stepł	en, Dr	× v Reason(	s) for Referral	× v	Potential D	iagnosis	× ~	Urgent 0.00	P1 14.00	P2 60.00	<sup>93</sup> 517.00				
Priority	×	Last Name	MCP		_										Clea	r	Find	
Referral 1 Id	Referral Type	Patient Name / 1 HCN	Patient Home Zone	Submitted Date	PCP/Referring Physician	Book With Specialist	Reason(s) for Referral	Problem Type	Potential Diagnosis	Diagnosis Acuity	Priority 1	Triage Consult Zone	Triage Consult Specialist	Status Date	Status 1	Queuing 12	Select Column	Details
ci-0002753	Orthopaedics	SPARKES, DWIGHT (-)	Eastern Urban	08-May-2025	Chaytor, Janet, Dr	Au, Keegan, Dr	Elbow	Bilateral	Dislocation (Acute)	1 - High Acuity	P2	Eastern Urban	Au, Keegan, Dr	12-May- 2025	Accepted & Prioritized for Consult	55		
<u>ci-0002761</u>	Orthopaedics	BAR, CHOCOLATE (879803505509)	Eastern Urban	09-May-2025	Chaytor, Janet, Dr	Au, Keegan, Dr	Нір	Bilateral	Osteoarthritis	2 - Regular Acuity	P2	Eastern Urban	Au, Keegan, Dr	09-May- 2025	Accepted & Prioritized for Consult	55		E
ci-0001792	Orthopaedics Legacy	RAMBO, JOHN (-)	Eastern Urban	22-Jul-2023			Нір	Left	Osteoarthritis	2 - Regular Acuity	P3	Eastern Urban	Croft, Stephen, Dr	24-Jul- 2023	Accepted & Prioritized for Consult	-144		E
ci-0002012	Orthopaedics Legacy	RAMBO, JOHN (-)	Eastern Urban	22-Jul-2023			Hip	Left	Osteoarthritis	2 - Regular Acuity	P3	Eastern Urban	Croft, Stephen, Dr	24-Jul- 2023	Accepted & Prioritized for Consult	-144		
ci-0001616	Orthopaedics Legacy	RAMSEY, FLETA_TPCHI (109832179294)	Eastern Urban	24-Jul-2023			Нір	Bilateral	Osteoarthritis	2 - Regular Acuity	P3	Eastern Urban	Croft, Stephen, Dr	26-Jul- 2023	Accepted & Prioritized for Consult	-142		
ci-0001844	Orthopaedics Legacy	RAMSEY, FLETA_TPCHI (109832179294)	Eastern Urban	24-Jul-2023			Hip	Bilateral	Osteoarthritis	2 - Regular Acuity	P3	Eastern Urban	Croft, Stephen, Dr	26-Jul- 2023	Accepted & Prioritized for Consult	-142		
ci-0002064	Orthopaedics Legacy	RAMSEY, FLETA_TPCHI	Eastern Urban	24-Jul-2023			Hip	Bilateral	Osteoarthritis	2 - Regular Acuity	P3	Eastern Urban	Croft, Stephen, Dr	26-Jul- 2023	Accepted & Prioritized	-142		



- 3. An additional set of parameters are available to help with queuing for scheduling of consult appointments using the **Metric Parameters** section.
  - a. You may **adjust the values** assigned to each **Priority** (P-Urgent, P1, P2, P3) based on the policy / guidelines that have been set to manage referrals for scheduling of consult appointments. These guidelines may be provincial policy or specialistspecific standards.
  - b. As the values entered in the **Metric Parameters** section are changed, click **Find** to update the list displayed and update the values in the **Queuing** column.
  - c. The **Queuing** values are calculated based on the **Wait Time** and the values set in the **Metric Parameters** section. A **positive value** indicates that the Priority threshold has not been met yet. A **zero or negative value** indicates that the referral has exceeded the priority threshold and wait time criteria. Please refer to <u>Understanding Queuing Parameters</u> section for more details.

Filters   Stat	us: Accepted & I	Prioritized for Consu	lt								Metri	c Parameters			Referral	Count (Curr	ent Filter	): 91
Triage Consult Eastern Urb	Zone an XV XV L	Triage Consult Spe Au, Keegan, Dr	cialist Croft, Stepi MCP	nen, Dr	× v Reason(:	s) for Referral	×	Potential Di	iagnosis	× ~	1 Urgent 0.00	P1 14.00	P2 60.00	P3 517.00			Find	
Referral 1	Referral Type	Patient Name / 1 HCN	Patient Home Zone	Submitted 1 Date	PCP/Referring Physician	Book With Specialist	Reason(s) for Referral	Problem 1 Type	Potential Diagnosis	Diagnosis Acuity	Priority 1	Triage Consult Zone	Triage Consult Specialist	Status Date	Status 1	Queuing 12	Select Column	Details
1-0002753	Orthopaedics	SPARKES, DWIGHT (-)	Eastern Urban	08-May-2025	Chaytor, Janet, Dr	Au, Keegan, Dr	Elbow	Bilateral	Dislocation (Acute)	1 - High Acuity	P2	Eastern Urban	Au, Keegan, Dr	12-May- 2025	Accepted & Prioritized for Consult	55		E
1-0002761	Orthopaedics	BAR, CHOCOLATE (879803505509)	Eastern Urban	09-May-2025	Chaytor, Janet, Dr	Au, Keegan, Dr	нір	Bilateral	Osteoarthritis	2 - Regular Acuity	P2	Eastern Urban	Au, Keegan, Dr	09-May- 2025	Accepted & Prioritized for Consult	55		E
1-0001792	Orthopaedics Legacy	RAMBO, JOHN (·)	Eastern Urban	22-Jul-2023			Нір	Left	Osteoarthritis	2 - Regular Acuity	P3	Eastern Urban	Croft, Stephen, Dr	24-Jul- 2023	Accepted & Prioritized for Consult	-144		E
i-0002012	Orthopaedics Legacy	RAMBO, JOHN (-)	Eastern Urban	22-Jul-2023			Нір	Left	Osteoarthritis	2 - Regular Acuity	P3	Eastern Urban	Croft, Stephen, Dr	24-Jul- 2023	Accepted & Prioritized for Consult	-144		
<u>i-0001616</u>	Orthopaedics Legacy	RAMSEY, FLETA_TPCHI (109832179294)	Eastern Urban	24-Jul-2023			Нір	Bilateral	Osteoarthritis	2 - Regular Acuity	P3	Eastern Urban	Croft, Stephen, Dr	26-Jul- 2023	Accepted & Prioritized for Consult	-142		
1-0001844	Orthopaedics Legacy	RAMSEY, FLETA_TPCHI (109832179294)	Eastern Urban	24-Jul-2023			Hip	Bilateral	Osteoarthritis	2 - Regular Acuity	P3	Eastern Urban	Croft, Stephen, Dr	26-Jul- 2023	Accepted & Prioritized for Consult	-142		
-0002064	Orthopaedics	RAMSEY, FLETA_TPCHI	Eastern Urban	24-Jul-2023			Нір	Bilateral	Osteoarthritis	2 - Regular Acuity	P3	Eastern Urban	Croft, Stephen, Dr	26-Jul- 2023	Accepted & Prioritized	-142		

- 4. Based on policy / guidelines and any other criteria, identify those referrals in the list that should be sent to **Community Wide Scheduling (CWS)**, scheduling team, or office staff and check each referral in the **Select Column**. Once you select the first referral for scheduling, the **Preview Window** opens. Continue to select all the referrals to be included in the file.
  - a. Once all are selected, click the green Export which creates a zip file (containing an Excel spreadsheet file and PDF file(s)). Use the scroll bar along the bottom to display the Select Column to add multiple referrals to the queue.



Filters   Status: A	ccepted & Prio	ritized for Cor	sult											Metri	c Parameters		
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PCP/Referring Physician	Book With Specialist	Reason(s) for Referral	Problem 1 Type	Potential Diagnosis	Diagnosis Acuity	Priority	Triage Consult	Triage Consult Specialist	Status Date	Status 1	Queuing	Select	Details	<	Preview Window	21	
Chaytor, Janet, Dr	Au, Keegan, Dr	Hip	Bilateral	Osteoarthritis	2 - Regular Acuity	P2	Eastern Urban	Au, Keegan, Dr	09- May- 2025	& Prioritized for	55			L	Referral Count (Selected): 3 Patient Name / HCN	Referral Id	Status Date
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		Hip	Left	Osteoarthritis	2 - Regular Acuity	P3	Eastern Urban	Croft, Stephen, Dr	24-Jul- 2023	Prioritized for	-144		e		RAMBO, JOHN (-)	ci-0002012	24-Jul-2023
										Accepted				⇒	RAMSEY, FLETA_TPCHI (109832179294)	ci-0001616	26-Jul-2023
		Hip	Left	Osteoarthritis	2 - Regular Acuity	P3	Eastern Urban	Croft, Stephen, Dr	24-Jul- 2023	& Prioritized for Consult	-144		۵				
		Нір	Bilateral	Osteoarthritis	2 - Regular Acuity	P3	Eastern Urban	Croft, Stephen, Dr	26-Jul- 2023	Accepted & Prioritized for Consult	-142						
		Hip	Bilateral	Osteoarthritis	2 - Regular Acuity	P3	Eastern Urban	Croft, Stephen,	26-Jul- 2023	Accepted & Prioritized	-142				_		

5. The generated **ZIP** file will be saved to the **Downloads** folder on your computer.

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- 6. Unzip the file by double-clicking on the filename. Open the Excel spreadsheet file to validate it includes the referrals you selected for scheduling of their consult appointment.
  - a. **[Optional]** Add column headings to the end of the list: **Scheduled Consult Appt Date, Specialist, Location,** and **Date Attended Consult Appt** which will be completed by scheduling.



#### Queuing Orthopedic Referrals | Central Intake

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### RECOMMENDATION

Move the generated ZIP file from the Downloads folder to a file location where you are tracking / managing the files that have been sent to or returned from CSW.

#### Note

If you open the CSV file and see the message "Investigation Required" in the column **Proceed to Scheduling** happens if another person has made a change to the referral from the time you selected, the referral for scheduling and clicked the button Generate CSV. You must review the referral to determine what has been changed / updated on the referral to determine if the referral may proceed to be scheduled. **If the referral can proceed, you must generate a new CSV file.** 



- b. Send the CSV file to Community Wide Scheduling (CSW), scheduler, or office staff.
- Once you have completed generating the CSV file, the Ready for queuing Specialist Appointment screen will have those referrals sent to scheduling removed from the list displayed.



Titlers   Status: Ac	cepted & Prioritized for Cor	Munt									Netric Parameter		Referral	Count (Current Fi	itter): 616			
iage Consull Zone aatern Urben	X V Triage Co	nsult Specialist	× ~ Reaso	n(s) for Referral	× v Potential Diagn	osis ×	<ul> <li>Priority</li> </ul>	× v Last Nar	e MCP	?	Urgent P1 0.00 14.00	F2 F3	<u> </u>					
													Cier	M	Find			
Referral Id :	Referral Type :	Patient Name / HCN :	Patient Home	Submitted Date :	PCP:Referring Physician	Book With Specialist	Reason(s) for Referral	Problem Type :	Potential Diagnosis	Diagnosis Acuity :	Priority 1	Triage Consult ; Zone	Cier Triage Consult Specialist	status Date :	Status :	Gueuing 12	Select Column	Def
eferral ld :	Referral Type : Orthopsedics	Patient Name / HCN 1 BAR, CHOCOLATE (87993355559)	Patient Home ; Zone ; Eastern Urban	Submitted Date : 00-May-2025	PCP/Referring Physician Chayter, Janet, Dr	Book With Specialist Au, Keegan, Dr	Reason(s) for Referral Hip	Problem Type : Bilateral	Potential Diagnosis ; Ostecarthritis	Diagnosis Acuity : 2 - Regular Acuity	Priority 11 P2	Triage Consult ; Zone ; Eastern Urban	Clea Triage Consult Specialist Au, Keepar, Dr	sr Status Date 1 00-May-2025	Stafus : Accepted & Prioritized for Consult	Queuing <sub>1</sub> 2 57	Select Column	De
Referral ld <sub>1</sub> <u>5-0002781</u> 5-0002038	Referral Type : Orthopaedics Orthopaedics Legacy	Patient Name / HCN : BAR, CHOCOLATE (STV803555500) EORDEROOP, BILL (r)	Patient Home : Zone : Eastern Urban : Eastern Urban	Submitted Date ; 00-May-2025 21-Jul-2023	PCP:Referring Physician Chaytor, Janet, Dr	Book With Specialist Au, Keegan, Dr	Reason(s) for Referral Hp	Problem Type : Bilateral Bilateral	Potential Diagnosis ; Ostecarthritis Ostecarthritis	Diagnosis Acuity : 2 - Regular Acuity 2 - Regular Acuity	Priority <sub>1</sub> 1 P2 P3	Triage Consult : Zone : Eastern Urban Eastern Urban	Clea Triage Consult Specialist Au, Keegan, Dr Not Available	er 5 Status Date : 00-May-2025 23-Jui-2023	Status : Accepted & Prioritized for Consult Accepted & Prioritized for Consult	Quesing 12 57 -143	Select Column	

8. A separate PDF will be included in the ZIP file for each referral selected for use within your office (i.e., upload to your EMR).

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## **Understanding Queuing Parameters**

The Referral Management List has been configured to support prioritizing referrals based on a queuing parameter applied to the referral's wait time. This calculation identifies referrals which have reached their wait time thresholds to be selected for scheduling. The formula is Referral Wait Time – Queuing Parameter. If the result value is 0 or negative, the referral has reached its wait time threshold and can be scheduled. Referrals with different priorities can have different queuing parameters assigned. Queueing default parameters are:

Queuing Parameter (QP) - Default	Referral Wait Time (WT) - Sample	Queueing Value (QV) QP – WT = QV
Urgent Referral: QP= 0 days	Urgent Referral: WT=0 days	QP (0) – WT (0) = QV (0)
P1 Referral: QP=14 days	P1 Referral: WT=5 days P1 Referral: WT=15 days	QP (14) – WT (5) = QV (9) QP (14) – WT (15) = QV (-1)**
P2 Referral: QP=60 days	P2 Referral: WT=40 days P2 Referral: WT=61 days	QP (60) – WT (40) = QV (20) QP (60) – WT (61) = QV (-1)**
P3 Referral: QP=517 days	P3 Referral: WT=100 days P3 Referral: WT=520 days	QP (517) – WT (100) = QV (417) QP (517) – WT (520) = QV (-3)**

\*\* Referrals with Queuing Values of zero (0) or negative have met or exceeded the queueing parameter threshold and are the next candidates for scheduling. Using this approach also supports "zipper merging" which allows for scheduling of referrals of different priorities together, rather than only scheduling the highest priority referrals.

The following **Referral Management Lists (RML)** provide priority queueing parameters, as well as the ability to select and export the selected referrals for scheduling:

- Wait 1 RML Ready for queuing Specialist Appointment (Ortho/Ophtha)
- Wait 2 RML Ready for queuing Optimization Appointment (Ortho only)
- Wait 2 RML Ready for queuing Procedure Appointment (Ortho/Ophtha)

