

FEBRUARY 14, 2025

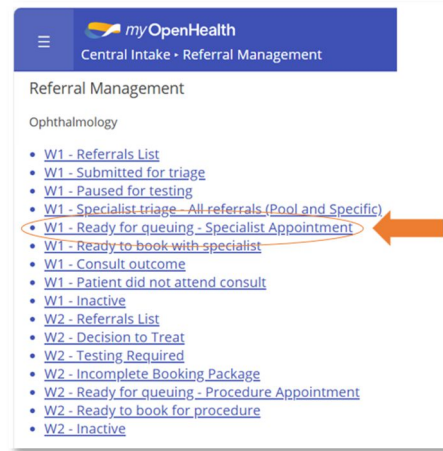
# Queuing Ophthalmology Referrals

CENTRAL INTAKE

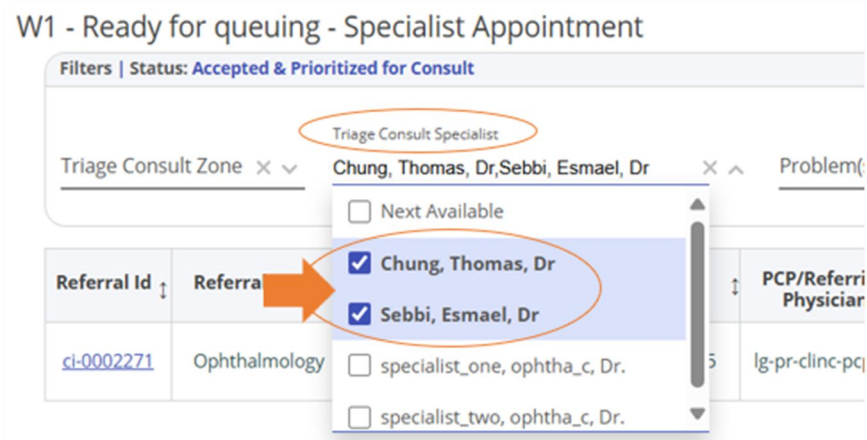


# Managing the Queue to Book the Specialist Appointments

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, problem, or priority**. The Triage Consult Specialist drop down list allows you to select 1 or more specialists to filter.



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 specialist-specific 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 [Understanding Queuing Parameters](#) section for more details.

W1 - Ready for queuing - Specialist Appointment

Filters | Status: Accepted & Prioritized for Consult

Metric Parameters: P-Urgent: 0.00, P1: 14.00, P2: 60.00, P3: 517.00

Referral Count (Current Filter): 3

Referral Id	Referral Type	Patient Name / HCN	Patient Home Zone	Submitted Date	PCP/Referring Physician	Book With Specialist	Problem(s)	Functional Impact	Priority	Triage Consult Zone	Triage Consult Specialist	Status Date	Status	Queuing	Select Column	Details
ci-0002346	Ophthalmology Legacy	BAR, CHOCOLATE (879803505509)	Eastern Urban	13-Dec-2019			• Other		P2	Western	Next Available	13-Feb-2025	Accepted & Prioritized for Consult	-1829	<input type="checkbox"/>	
ci-0000379	Ophthalmology	COAT, LISA (-)	Eastern Urban	07-Oct-2024	Brown-Mahar, Tracey, Dr	Bramwell, Lori, Dr	• Retina • Cornea	No	P2	Eastern Urban	Eastern Urban, Specialist, Dr.	13-Feb-2025	Accepted & Prioritized for Consult	-69	<input type="checkbox"/>	
ci-0002271	Ophthalmology	HOOD, ROBIN (-)	Labrador-Grenfell	23-Jan-2025	Ig-pr-clinc-pcp.mh	Next Available	• Other	No	P2	Labrador-Grenfell	Mdlankoma, Rasayi, Dr	13-Feb-2025	Accepted & Prioritized for Consult	39	<input type="checkbox"/>	

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.

W1 - Ready for queuing - Specialist Appointment

Filters | Status: Accepted & Prioritized for Consult

Metric Parameters: P-Urgent: 0.00, P1: 14.00, P2: 60.00, P3: 517.00

Referral Count (Current Filter): 3

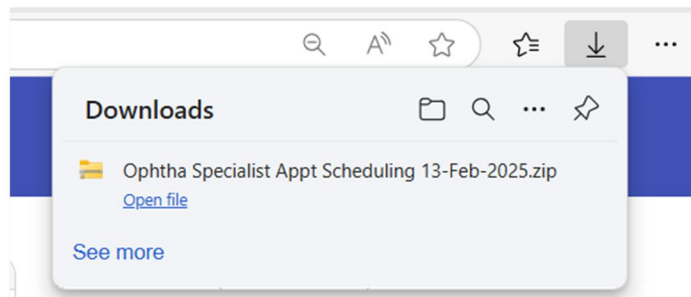
Patient Home Zone	Submitted Date	PCP/Referring Physician	Book With Specialist	Problem(s)	Functional Impact	Priority	Triage Consult Zone	Triage Consult Specialist	Status Date	Status	Queuing	Select Column	Details
Eastern Urban	13-Dec-2019			• Other		P2	Western	Next Available	13-Feb-2025	Accepted & Prioritized for Consult	-1829	<input checked="" type="checkbox"/>	
Eastern Urban	07-Oct-2024	Brown-Mahar, Tracey, Dr	Bramwell, Lori, Dr	• Retina • Cornea	No	P2	Eastern Urban	Eastern Urban, Specialist, Dr.	13-Feb-2025	Accepted & Prioritized for Consult	-69	<input checked="" type="checkbox"/>	
Labrador-Grenfell	23-Jan-2025	Ig-pr-clinc-pcp.mh	Next Available	• Other	No	P2	Labrador-Grenfell	Mdlankoma, Rasayi, Dr	13-Feb-2025	Accepted & Prioritized for Consult	39	<input type="checkbox"/>	

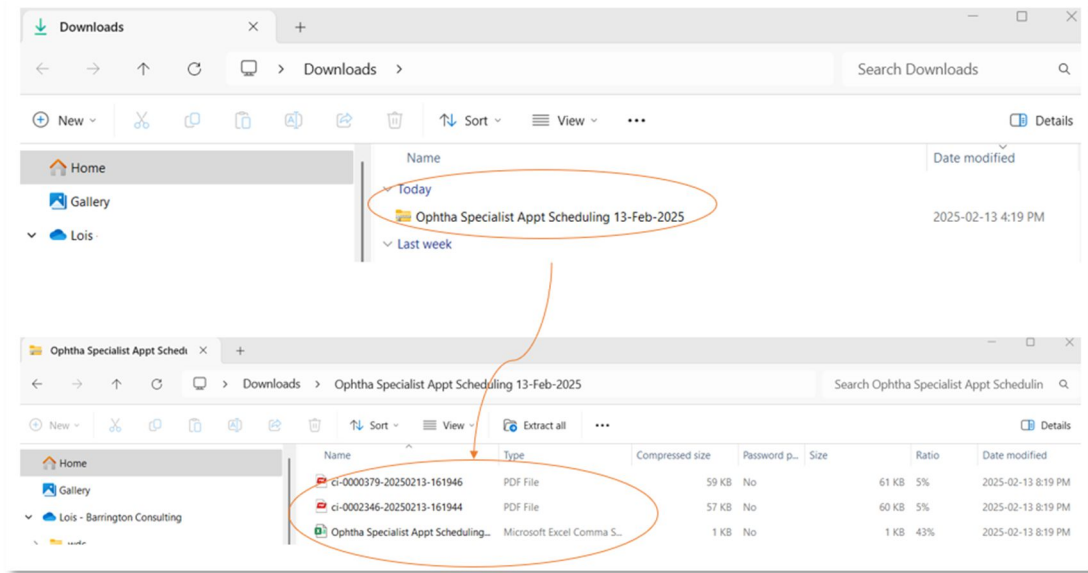
Preview Window: Referral Count (Current Filter): 3, Referral Count (Selected): 2

Patient Name / HCN	Referral Id	Status Date
COAT, LISA (-)	ci-0000379	13-Feb-2025
BAR, CHOCOLATE (879803505509)	ci-0002346	13-Feb-2025

Page 1 of 1 | Back to Referral Management | Export | **Export** | Cancel

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





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.
  - b. Send the CSV file to Community Wide Scheduling (CSW), scheduler, or office staff.

**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.

Referral Type	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q
Referral Ty Patient Na	Patient Ho	Submitted Date	PCP/Refer Book With	Problem(s)	Functional	Priority	Triage Con	Triage Con	Status	Date	Status	Queuing	Proceed to Scheduling				
Ophthalmc ZTEST, TES	Eastern Ur	20-Dec-24	Brown-Mal Bramwell,	[Glaucoma]	No	P1	Eastern Ur Bramwell,		23-Dec-24	Accepted & Prioritized for Consult		10	Ready to Schedule				
Ophthalmc RAMBO, JK	Eastern Ru	09-Sep-24	Brown-Mal Dang, Dr	[Glaucoma]	No	P2	Eastern Ru Dang, Harri		19-Sep-24	Accepted & Prioritized for Consult		115	Ready to Schedule				
Ophthalmc VALENCIA	Eastern Ur	12-Mar-23		[Glaucoma]		P3	Eastern Ur Nofal, Nou		19-Dec-24	Accepted & Prioritized for Consult		647	Ready to Schedule				

**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.**

	○
g	Proceed to Scheduling
65	Investigation Required

- 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.

W1 - Ready for queuing - Specialist Appointment

Filters | Status: Accepted & Prioritized for Consult

Triage Consult Zone x Problem(s) x Priority x

Metric Parameters

P-Urgent P1 P2 P3  
0.00 5.00 25.00 100.00

Referral Count (Current Filter): 1

Clear Find

Referral Id	Referral Type	Patient Name / HCN	Patient Home Zone	Submitted Date	PCP/Referring Physician	Book With Specialist	Problem(s)	Functional Impact	Priority	Triage Consult Zone	Triage Consult Specialist	Status Date	Status	Queuing	Select Column
0000317	Ophthalmology	TEST, TEST (-)	Eastern Urban	09-Dec-2024	Brown-Mahar, Tracey, Dr	Bramwell, Dr	Glaucoma Cornea	Yes	P2	Eastern Urban	Bramwell, Dr	20-Dec-2024	Accepted & Prioritized for Consult	2	<input type="checkbox"/>

- 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).

HCN: 01P\_A0000123  
Name: JESSIE SMITH  
Date of Birth: 1985-04-05  
Address: 100 MAIN ST EAST STREET, DUNDAS, ONTARIO, M1H 1A1  
Tel: (416) 593-1234

Ordering Provider / Clinic:  
Brown-Mahar, Tracey, Dr  
Dr. Tracey Brown-Mahar Clinic  
Phone: 905-884-1234 Fax: 905-755-5845  
181 Main Street East, Suite 1, St. John's, NL, A1E 1A4

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**Ophthalmology**

Submitted Date: 2024-09-09

**Clinical Information**

**Primary Problem(s)**  
None, Cornea

**Symptoms**  
Double Vision  
Condition or Symptoms: Worsening Duration of Symptoms: 1-2 weeks (last week) Intensity of Symptoms: Moderate

**Ocular History**  
Visual Acuity: Right Eye Measurement (e.g. 20/20): 20/20 Left Eye Measurement (e.g. 20/20): 20/20  
Has Patient Previously Seen an Ophthalmologist? No  
Previous Eye Surgery: 0-12 days  
Contact Lens User: No

**Functional Impact**  
Are patient's Activities of Daily Living Affected? No

**Medical History**  
Comorbidities: None

**Patient Supplemental Information**  
Has the patient had an eye surgery completed within the last 12 days? No  
Patient Location: Patient Home Zone  
Zone: Eastern Urban Book with Specialist: Bramwell, Lee, Dr

**Height and Weight**  
Is the patient's BMI greater than 40? No

**Appointment Location**  
Is there a compelling reason for the patient to be seen outside of their home-designated zone? No

**Consult Triage Information**

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Referral ID: 0000317 Consult Priority: P2 Page 1 of 1 Printed Date: 2025-Feb-12

## 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 queuing 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 queuing 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)