

Creating the Referral

Once you have placed a patient in focus and selected Create New Referral, the Referral Workflow Wizard appears. Seven simple steps are used to **complete** a new referral.

Step 1: Initiating a Referral

1. Search for the desired patient.
2. Click on the Patient's Name to display the Patient Record and place the patient in focus.
3. Select the **Referrals** tab of the Patient's chart.

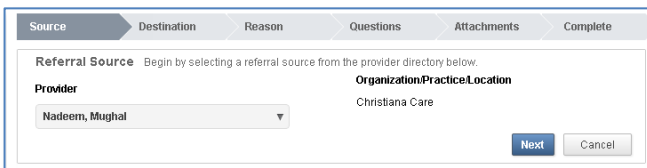


4. Click **Create New Referral** on the patient chart. The New Patient Referral screen appears.

Step 2: Selecting a Source

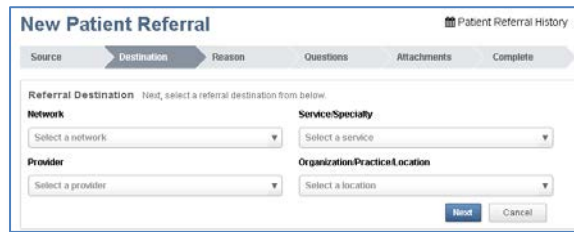
The Provider dropdown defaults to the provider's name if they are logged in and creating the referral. You can also search for providers with the dropdown search tool.

The Organization/Practice/Location field defaults to the provider's information.

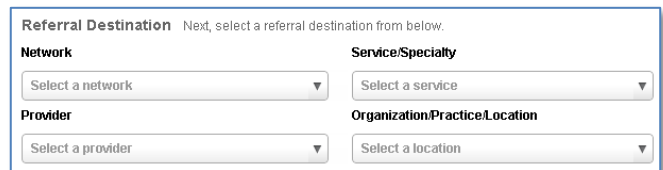


Step 3: Specifying the Destination

This tab determines who will receive the referral. The Provider field is required.



Send Referral Using the Provider, Practice/Location (Practice Name), or Service Search Boxes



1. In each of the search fields, type at least 3 letters for matching choices to appear.
2. Select the desired result.

Users may choose any of the four drop-downs to search first. Once a selection is made, the other drop-down options will filter.

Sending a Referral Out of Network

If an out-of-network provider has been selected, the Reason for going Out of Network list will appear. You must select the reason for referring the patient out of network before the referral can be submitted.



The screenshot shows a dropdown menu for "Reason for going Out of Network". The menu is open, displaying a list of reasons. The first option, "Necessary services not available in network", is highlighted in blue. Other options include "Distance and Geography", "Limited availability of network providers", "Prior service experience from network providers", "Unfamiliar with network providers", and "Active Treatment during authorized transitional period".

Note: The Reason for going Out of Network list will not appear for those providers logged in to the system who are not affiliated with any network.

Inbound Referral Preferences

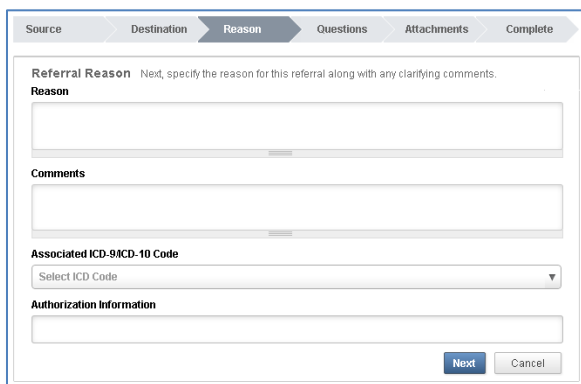
Once the Provider and Organization/Practice/Location are selected, any of the Inbound Referral Preferences set up by the destination provider will appear. These preferences are specific to the destination provider and will contain any general instructions for patients when a new referral is created.

Reference Documents

Providers can choose to share and attach documents for all new referrals to view, potentially eliminating the need for phone calls when a new referral is created. To view the attached files, select the View button and you will be asked to either Open or Save the file.

Note: The reference documents displayed when creating a referral are not included in the total attachment size limit of 20MB.

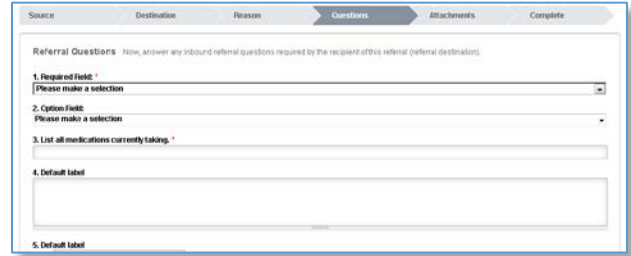
Step 4: Reason



The screenshot shows the "Reason" step of the referral creation process. The "Referral Reason" section has a text area for "Reason" and a "Comments" section. Below these is a dropdown menu for "Associated ICD-9/ICD-10 Code" with the text "Select ICD Code". At the bottom, there is an "Authorization Information" section with a text area. "Next" and "Cancel" buttons are at the bottom right.

1. Specify a reason for the referral.
2. Enter any additional referral Comments to send with the referral.
3. Search and select the associated ICD-9/ICD-10 code for the referral.

Step 5: Questions



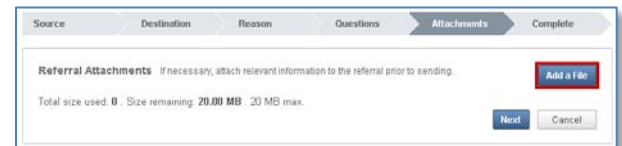
The screenshot shows the "Questions" step of the referral creation process. It displays a list of "Referral Questions" with five numbered items. The first three items have a red asterisk next to them, indicating they are required. Item 1 is "Prepared Field:" with a dropdown menu. Item 2 is "Optim Field:" with a dropdown menu. Item 3 is "List all medications currently taking:". Item 4 and 5 are "Default label" text areas. "Next" and "Cancel" buttons are at the bottom right.

Answer any questions required by the Destination provider. Each provider can create their own unique list of questions. Required questions are noted with a red * asterisk. You will not be able to send the referral if you do not respond to required questions.

Step 6: Attachments

Attachments can be added during the referral creation process by the Source provider to communicate details of the patient's history or treatment.

1. Click **Add a File**.



The screenshot shows the "Attachments" step of the referral creation process. It displays a "Referral Attachments" section with a text area for "Referral Attachments" and a "Total size used: 0. Size remaining: 20.00 MB (20 MB max)." message. An "Add a File" button is on the right. "Next" and "Cancel" buttons are at the bottom right.

2. The File Upload window opens. Select the file to attach and click **Open**.
3. Repeat until all necessary files have been attached to the referral.



The screenshot shows the "Attachments" step of the referral creation process with a file attached. The "Referral Attachments" section displays a file named "ICD Form...xlsx (1.18 MB)" with a "View" button. The "Total size used: 1.18 MB. Size remaining: 18.82 MB (20 MB max)." message is updated. "Add a File" button is on the right. "Next" and "Cancel" buttons are at the bottom right.

Note: There is a maximum total attachment size per referral. The aggregate size is displayed on your screen. The system displays the Total size used and Size remaining totals. If adding a file will exceed the allowed amount, a warning to the user will display, and the file will not be added.

Step 7: Complete

Review the referral information. Any required information will be listed in red and the referral cannot be completed until those pieces of information are included. If incorrect, click on the corresponding tab to make changes. If correct, click the Refer [PATIENT NAME] button.