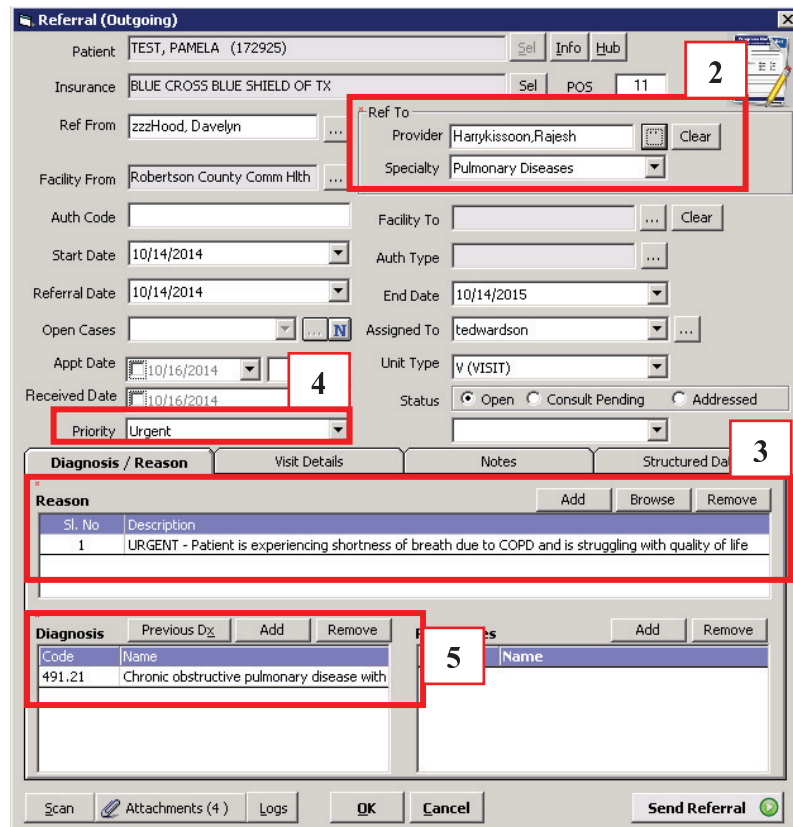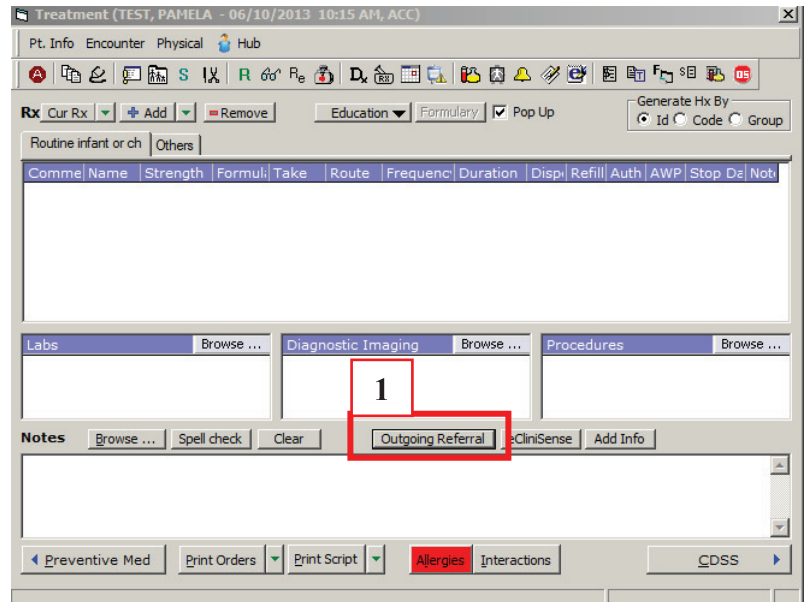## VIII. Referrals

1. An outgoing referral for a patient can be created by the provider from the TREATMENT section of the progress note.

2. Select the specialist by first choosing the specialty and then the provider.

3. A "Reason" must be entered before the referral can be sent. On the reason line, please provide a succinct reason for the referral (i.e. the general purpose of the referral).

4. If the referral is urgent, please also indicate this in the "Reason" section as this will notify the specialist of the importance of the referral. Additionally, under "Priority", please select ROUTINE, URGENT, or STAT. This is to alert our designated staff member on the importance of the referral.

5. A diagnosis must also be entered before the referral can be sent. Please select a diagnosis by clicking ADD under the "Diagnosis" section.

6. The referral can then be assigned to the respective staff member for follow-up, or it will be automatically assigned if this has been set up. ***Referrals should never be assigned to a provider*** Referrals will show up under the R jelly bean for the "assigned to" staff member. Details such as the referral date, appointment date, etc. can be documented on the referral screen. The referral request can also be faxed to the appropriate receiving physician with the required attachments.

7. To attach documents, click on the ATTACHMENTS button.

8. The ATTACHMENTS window will allow you to attach the medical summary, progress notes, lab reports, diagnostic imaging, patient documents, and specialty forms. A relevant progress note with the treatment plan should **ALWAYS** be attached to the referral as well as any relevant tests or documents. "Attach Medical Summary" should automatically be checked. If it is not, then please make sure you check it (this is a Meaningful Use requirement). Documents that were originally scanned as .tiff documents may not attach and may need to be faxed separately.

Insurance authorization should be obtained prior to the referral being sent and prior to scheduling the appointment if approval is necessary

---

9. To fax the referral with the respective attachments, click on the "Send Referral" button and choose the FAX WITH ATTACHMENTS option.

10. All communication with the patient and the receiving provider's office should be documented in the "Notes" tab under GENERAL NOTES.

11. Once an appointment is scheduled with the receiving provider, update the "Appt. Date".

12. Then change the status of the referral to "Consult Pending" indicating that you are waiting for a consult note from the receiving provider for that referral.

Once the consult notes are received and attached to the referral, the status should be changed to "Addressed" which will permanently close the referral.

Referrals should never be assigned to a provider. If you have a question for the provider or need clarification, please send them a telephone encounter.