Received consult notes can be attached directly to the Outgoing Referral by the following steps:

The un-reviewed Consult Note has to be filed in the Referral Notes section of Patient Documents



To attach this document, open the Consult Note to show *Document Details* and click on the ellipsis (...) beside the *Attached To* box

🖏 Document Details - TEST, LAB Thadious 2/12/1970								
TEST, LAB (asdfasdf), 45 Y, F 🛯 Sel	Info Hub 🖪 🜌 🗚	lergies 🛛 🖾 Billing	Alert				
	123 MyAddress1 Bryan, TX 77801 H:979-255-7273 M:979-255-7273 DOB:02/12/1970 dfowler@bycaa.org	Wt 09/29/15: 135 lbs. Appt[L]:10/06/15(RV) PCP: Parsi, Kia Language: Urdu Translator: Yes	Ins: Self Pay Acc Bal: \$0.00 Guar: Baby TEST Gr Bal: \$1.00 Ref: Glidewell,	CLICK TO EDIT	SECURE NOTES ImTc#123456789 ctr+pt passes out with blood draw			
Medical Sumr	nary OB Summary CD	SS Alerts Labs DI	Procedures Growt	h Chart Imm/T.Inj	Encounters Patient			
lí l	Document Detai	s	<u> </u>	Progress Notes				
Name Description	Consult notes from Cardi	ologist	Add Description	Options Reviewed Reviewed Doc High Priority Assigned To Fowler, RN, Danie				
Tag			Brows	e <u>F</u> acility				
Scanned <u>B</u> y Attached <u>T</u> o	Fowler, RN, Daniel L	▼ <u>S</u> canned	d Date 1/15 5	Attach To Pa	etient			

The Referrals for screen should open, highlight the referral that you want to attach the notes to

Ę	Refe	errals for TEST,	LAB Thadious								×
	Patie	ent TEST, LA	B Thadious					New	<u>U</u> pdate	e <u>D</u> el	ete
f			Incoming				Ou	itgoing			
		Date	Reason	Referral Fron	Referral To	Speciality	Start Date	End Date	Allow	Used \	<u> </u>
		10/12/2015	repeaded issu	Glidewell,Kim		Cardiolog	10/12/2015	10/12/2016	0	0	
		10/06/2015	sdfsdf	Clarke,Brend		Family Pri	10/06/2015	10/06/2015	0	0	

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Then click on the "Associate" button at the bottom of the same page. Page should close.

11/20/2014 Mammogram, Nicolwala,Ac Texas A&MF Gastroent 11/20/2014 11/20/2015 1 1	05/20/2015	had positve Fl	Alonge,Oluse	Central Texa	Gastroent	05/20/2015	05/20/20	16 0	0	
Associate	11/20/2014	Mammogram,	Nicolwala,Ac	Texas A&M F	Gastroent	11/20/2014	11/20/20	15 1	1	-
Associate	 									
								Associate		<u>C</u> lose

You should now see in the *Attached To* box, the referral that this note is now attached to. If desired, you can click on the *Make this as document name* and it will automatically update the document name and dating format.

🖏 Document Details - TEST, LAB Thadious 2/12/1970									
TEST, LAB (asdfasdf), 45 Y, F Sel Info Hub 🔝 🔯 Allergies 🔯 Billing Alert									
	123 MyAddress1 Wt 09/29/15: 135 lbs. Appt(L):10/06/15(RV) Ins: Self Pay Acc Bal: \$0.00 CLICK TO EDIT SECURE NOTES 1:979-255-7273 DOB:02/12/1970 PCP: Parsi, Kia Language: Urdu Ins: Self Pay Acc Bal: \$1.00 CLICK TO EDIT SECURE NOTES 0:08:02/12/1970 dfowler@bvcaa.org Translator: Yes Ref: Glidewell, Clidewell, CLICK TO EDIT SECURE NOTES								
Medical Sumn	Medical Summary OB Summary CDSS Alerts Labs DI Procedures Growth Chart Imm/T.Inj Encounters Patient								
	Document Details Progress Notes								
Name 10/12/2015 repeaded issues with chest pain when walking x : Browse Options Add Description									
Tag Scanned <u>B</u> y Attached <u>T</u> o	Fowler, RN, Daniel L Scanned Date 1 /15/2015 Fowler, RN, Daniel L Image: Comparison of the state								

What is listed in the Reason section of the referral will be the name of document (if the *Make this as document name* option is used)

Reason		Add	Browse	Remove
Sl. No	Description			
1	repeaded issues with chest pain when walking x 3 month			
2	non-specific abnormailty noted on EKG			
* Diagnosis Code R07.9	Previous Dx Add Remove Procedures Name Code Name Chest pain Image: Code Name		Add	Remove
	This paper clip means that results or notes are attached, click on this button to view them.			
🖉 <u>S</u> can 🖉	Attachments Logs <u>OK</u> <u>Cancel</u>		Send Ref	erral 😡 🔻

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Mark referral as "Addressed" and send consult note to provider's "D" jellybean with note in the *Discerption* window (this is how we deal with labs and DI):

🖏 Document Details - TEST, LAB Thadious 2/12/1970									
TEST, LAB (asdfasdf), 45 Y, F 🛯 Sel	Info Hub 🖪 🛛 🗚	llergies 🛛 🖾 Billing	Alert					
	123 MyAddress1 Hryan, TX 77801 H:979-255-7273 M:979-255-7273 DOB:02/12/1970 dfowler@bvcaa.org	Wt 09/29/15: 135 lbs. Appt(L):10/06/15(RV) PCP: Parsi, Kia Language: Urdu Translator: Yes	Ins: Self Pay Acc Bal: \$0.00 Guar: Baby TEST Gr Bal: \$1.00 Ref: Glidewell,		SECURE NOTES ImTc#123456789 ctr+pt passes out with blood draw				
Medical Summ	nary OB Summary CD	SS Alerts Labs DI	I Procedures Growt	h Chart Imm/T.Inj	Encounters Patient [
ſ	Document Detail	s	<u> </u>	Progress Notes]				
Name Description	Name 10/12/2015 repeaded issues with chest pain when walking x : Browse Options Add Description Reviewed Doc and Lab Reviewed Doc and Lab Logs Description Fowler, RN,Daniel L 10/15/2015 06:11:38 PM CDT > Consult notes attached to referral and referral marked as "Addressed" Assigned To								
Tag			Brows	Fowler, RN, Danie					
Scanned <u>By</u>	Fowler, RN, Daniel L	▼ <u>S</u> canne	d Date 1/15/2015	-					
Attached <u>T</u> o	10/12/2015 repeaded is	sues with chest pain wh	nen walking x 3 mon ⁱ .	Attach To Pa	tient				
	Make this as documen	t name Mo	di View Fax						