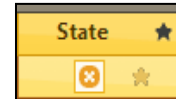




Sending and Receiving Providers are able to cancel a referral for a variety of reasons. It is therefore important to note the following for all offices:

- All requests will be sent to the other office who must acknowledge the cancellation *before* the status is updated or changed to a Cancelled status.
- Therefore, the status of the referral will remain in its current state (i.e. “Accepted” or “Scheduled” until it is acknowledged by the other office.
- It is important for offices to periodically review the **STATUS** section of all **New** or **Not Yet Accepted** and **In Progress** referrals for requested cancellations which are noted by a **Red X**.



- You can determine who requested the cancellation by hovering over the **Red X**:
 - Requested cancellations **FROM** your office state the following: **“Requested to be cancelled”**. **NO ACTION NEEDED**

	State	★	Patient	DOB	Status
1		★	Jetson, Elroy	01/01/2005	Accepted
2		★	Jetson, Elroy	01/01/2005	Accepted

Requested to be cancelled; Reason: Patient chose another provider

- Requested cancellations **TO** your office state the following: **“Requested by, (and the name of the requesting office)”**. **ACTION NEEDED**

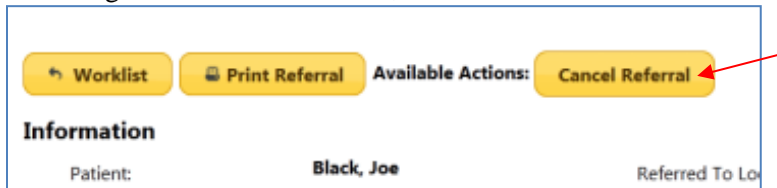
	State	★	Patient	DOB	Status
1		★	Elvira, Jetson	01/01/2005	Scheduled

Requested, by ZZZ Test MHC Specialty Clinic, to be cancelled; Reason: patient no showed

- **Note:** Once a cancellation request has been entered **the status can no longer be changed or updated.**

Steps to REQUEST a Cancellation

1. Log into the Command Center.
2. Click on the **Referrals Worklist** icon to display the Referrals Worklist.
3. Click on the **Sent or Received referrals** tab.
4. Select the patient.
5. To the right of Available Actions, select **Cancel Referral**.



6. Enter the cancellation reason in the text box. (You will not be able to choose “yes” to cancel the referral without a reason.)
7. Only check “purge” if appropriate (see page 2)
8. Choose **Yes**.

Cancelling vs. Declining

Since the Command Center allows you to **Cancel** and **Decline** a referral, which should I choose?

The option to **Decline** is only available on a received referral and must be chosen prior to accepting a referral. It is appropriate to decline a referral if you have reviewed the requested referral information and determined that the patient is not appropriate for your office (do not accept insurance; don't treat diagnosis or reason for referral; patient not allowed to return to office, etc.). Remember, you must give a reason for declining the referral.

Note: Do **not** purge the referral unless it was sent in error (think HIPAA, i.e. sent the referral on the wrong patient).

Reasons to Cancel

The following are typical reasons for cancelling a referral:

Sending Provider:

- Patient sent in error (HIPAA) – purge
- Patient chose another provider – don't purge
- Patient no longer wants referral – don't purge

Receiving Provider:

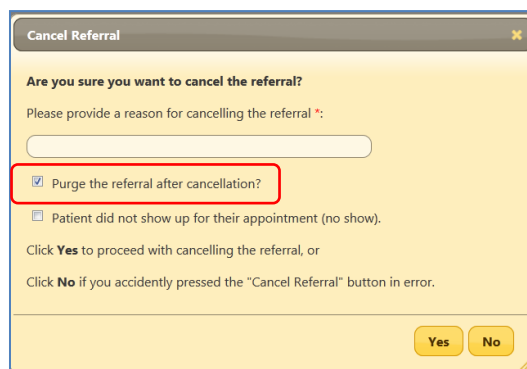
- Patient chose another provider – don't purge
- Patient no longer wants referral – don't purge
- Unable to contact/schedule the patient – don't purge
- No-show and is not rescheduling – don't purge

Purging a Referral

You can purge a cancelled referral that was **sent in error** (wrong patient, wrong provider, etc. – think HIPAA).

If you are the one requesting the cancellation:

1. Follow Steps 1 – 7 above.



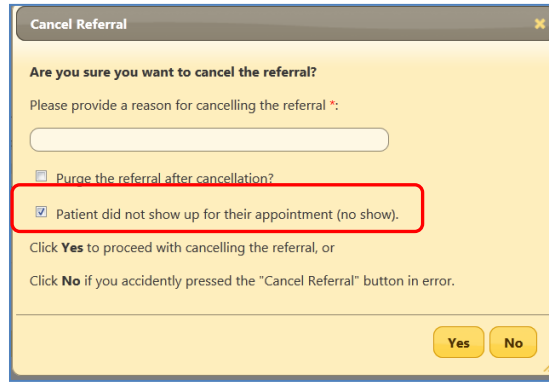
2. **Check the box to purge it after cancellation.**

3. Choose **Yes**.

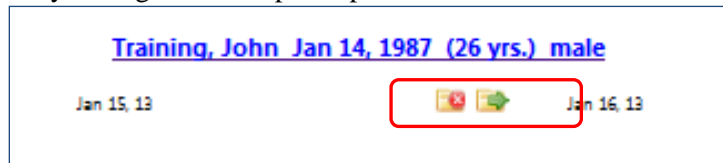
Note: Do not purge any other cancellations as you will lose the “history” of those referrals.

Cancellation for No Shows

Many practices have a need to track when patient does not show up to an appointment. Therefore, a checkbox is available to specify a “no show” as the reason for the cancellation. This information is available for auditing purposes.



Once acknowledged the non-compliant referral now displays as a **RED “x”** in the Referrals history allowing offices to quickly manage non-compliant patients.



The information also displays in the Status section of the Worklist:

State	Patient	DOB	Status
1	CNRTEST, BETTY	01/15/1974	Received
2	Training, John	01/14/1987	Scheduled (no show)

when printing the Referral:

Comments: Please evaluate and treat
Cancel Reason: No Show (no show)
Cancel Requested By: Joe Pintar at YYY UPGRADE TESTING Specialty (02/08/2013 04:21 AM)
Cancel Acknowledged By: Joe Pintar at yyy UPGRADE TESTING PCP (02/08/2013 04:22 PM)

and when printing the worklist:

#	Patient	Status	Sent To
1	CNRTEST, BETTY	Received	YYY New Code Specialty
2	Training, John	Scheduled (no show)	YYY New Code Specialty

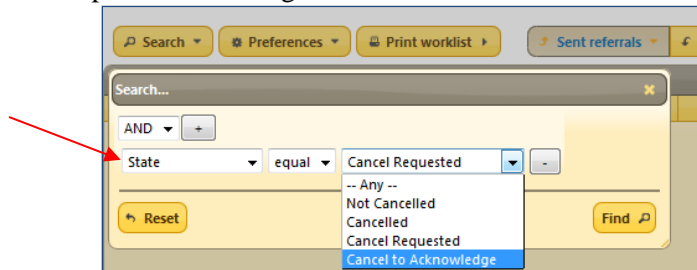
Steps to LOCATING a Cancellation

Requested to be Cancelled Referrals have been moved from the IN PROGRESS or NOT YET ACCEPTED Worklist to the CANCELLED Worklist. Note that the Status will not change to **Cancelled** until it has been Acknowledged:

State	Patient	DOB	Status	Sent To	To Provider
1	Again, Mister	01/26/1963	Received	YYY UPGRADE TESTING Sp	Hatchett, Bethany C MD
2	Requested to be cancelled; Reason: Cancelled 10/4/14 to test hiding referrals in a requested cancel state				
3	Black, Joe	01/01/1967	Cancelled	YYY UPGRADE TESTING Spec	Tucker, Cameron M MD

Filter by Cancel to Acknowledge AND Cancel Requested

A new filter selection has been added to the worklist **Search** dialog box for “**Cancel to Acknowledge**” and “**Cancel Requested**”. The definition of this search selection is the ability to search for all referrals that have been cancelled by another office and require acknowledgement. The addition was made to enhance workflow and help to better manage the worklist.



- Note:** Make sure that you review each work page.

1	TEST, Specialist	01/26/12
2	TEST, Specialist	01/26/12

Page 1 of 2

Cancellation Status Types

A differentiating status icon provides a visual indicator on the worklist further denoting the cancellation status of a referral based on WHO requested the cancellation. (The icon color depends on your MHC Preference theme selection – Example below is the Sunny theme).

Cancellation requested by your office = dark circled X (line 1). NO ACTION NEEDED BY YOU

State	Patient
1	CNRTEST, BETTY
2	Training, John

Requested to be cancelled; Reason: Patient chose another provider





Cancellation requested by other office = lighter circled X (line 2) and the name of the office displays in message: **ACTION NEEDED BY YOU**

State	Patient	DOB	Status
1	CNRTEST, BETTY	01/15/1974	Received
2	Training, John	01/14/1987	Scheduled (no show)

Requested by YYY New Code Specialty to be cancelled; Reason: Patient no-showed (no show)

Steps to ACKNOWLEDGE a Cancellation

1. Log into the Command Center.
2. Click on the **Referrals Worklist** icon to display the Referrals Worklist.
3. Click on the **Sent or Received referrals** tab.
4. Locate and select any patient with a large **Red X** icon.

2 " Sent referrals found				
	State	Patient	DOB	Status
1	 	CNRTEST, BETTY	01/15/1974	Received
2	 	Training, John	01/14/1987	Scheduled (no show)

Requested by YYY New Code Specialty to be cancelled; Reason: Patient no-showed (no show)

5. Open the patient. You will be able to review the reason for the cancellation and the person requesting the cancellation.

Worklist
Print Referral
Available Actions: Acknowledge Cancellation

Information

Patient:	Black, Joe	Referred To Location:	ZZZ Test MHC Specialty Clinic
Requested Provider:	TEST, Specialist 2	Referring Provider:	TRAINING, Doctor
Status:	Accepted - 02/19/2013 08:14 AM	Submitted By:	Ashley Pierson - 02/11/2013 01:48 PM
Associated ICD-9:	995.3	Authorization:	
Referral Reason:	allergy		
Comments:			
Cancel Reason:	Patient stated that they are feeling better		
Cancel Requested By:	Steve Spieker at ZZZ Test MHC Specialty Clinic ()		

6. To the right of Available Actions, select **Acknowledge Cancellation**.

Worklist
Print Referral
Available Actions: Acknowledge Cancellation

Information

Patient:	Black, Joe	Referred To Location:	ZZZ Test MHC Specialty Clinic
Requested Provider:	TEST, Specialist 2	Referring Provider:	TRAINING, Doctor

7. The following message will display:

Acknowledge Referral Cancellation ✕

Acknowledge cancellation of referral?

Purge the referral after cancellation?

Click **Yes** to proceed with cancelling the referral, or
Click **No** if you accidentally pressed the Acknowledge Cancellation button in error.

Yes
No

8. **ONLY** select **PURGE** if the referral was sent in error.
9. Select **Yes**.