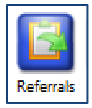
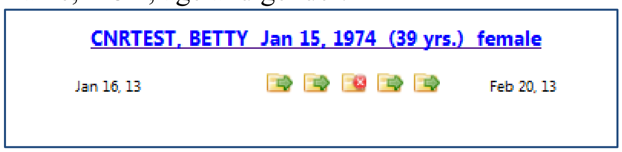


Creating a Referral

In the Referrals application, the icon changes depending on the context. If there is no green arrow, you will be transferred to the Referrals Worklist. In order to create a referral, you'll need to have selected a patient and have a **GREEN ARROW** (as displayed above).

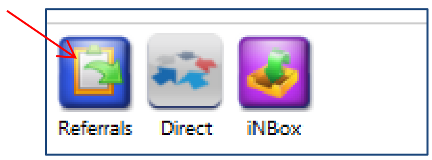
Creating a Referral

1. Prior to creating a referral, confirm that you see the following at the top of the page in the Patient Record: The patient's name, DOB, age and gender.

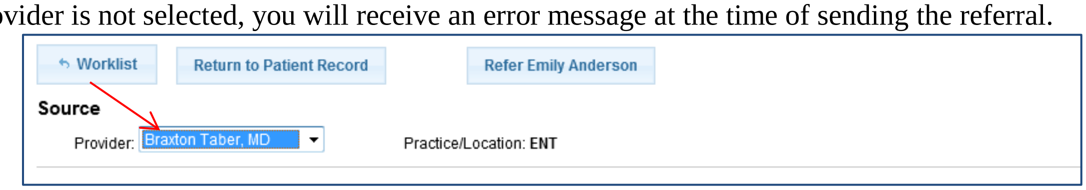


2. You will also know that you are ready to create a referral when the icon has a **GREEN ARROW**.

3. Click the Referrals icon on the Dashboard.

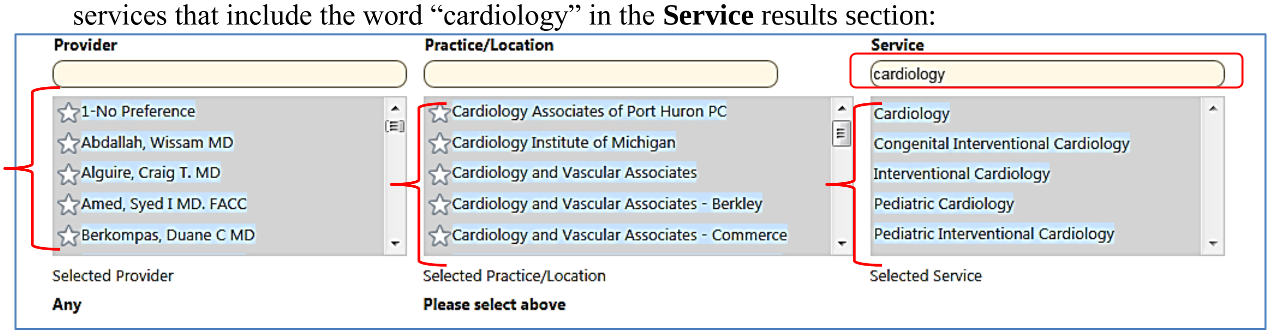


4. Select the provider from your office (required) from the Referring Provider drop-down list. If a provider is not selected, you will receive an error message at the time of sending the referral.

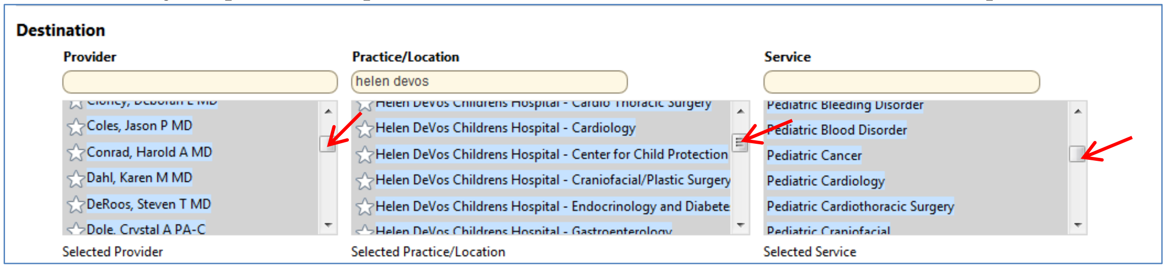


5. Using the **Provider**, **Practice/Location**, or **Service** search box, begin typing criteria for the referral destination. Depending on your search criteria, matching choices display.

   In the example below, the User typed in "cardiology" in the **Service** section. The results display cardiologists in the **Provider** results section, cardiology offices in the **Practice** results section and services that include the word "cardiology" in the **Service** results section:

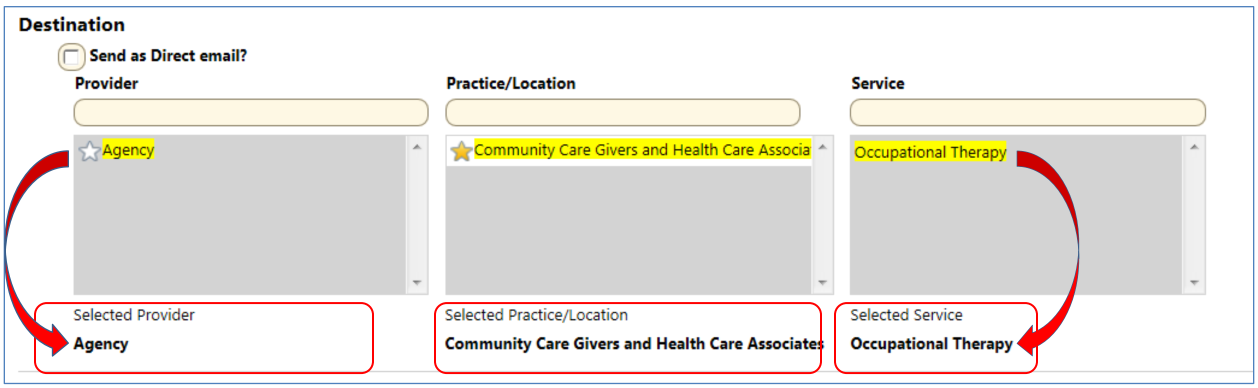


If you do not see your provider or practice, move the scrollbar to view more available options.



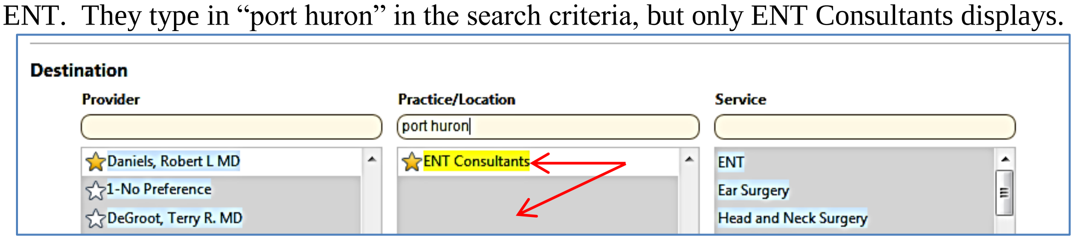
Selecting a Referral Destination:

The list of **Providers**, **Practice/Location** and **Services** are initially a "*display only*" section (highlighted in light blue as seen above). You must still select or click on a provider, office <u>and</u> service to make a referral. The selection will display in yellow and will display in the corresponding selected section below.

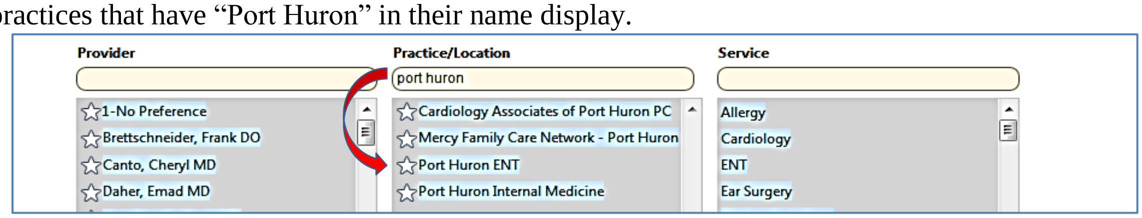


Note: If you have selected a Practice/Location, you must **UNSELECT** (un-highlight) it before searching for another office.

Example: ENT Consultants has already been selected and now the User would like to search for Port Huron ENT. They type in "port huron" in the search criteria, but only ENT Consultants displays.

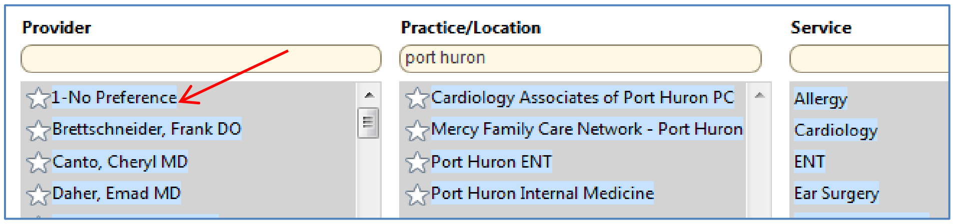


Once the User <u>unselects</u> or <u>un-highlights</u> "ENT Consultants" (by clicking on "ENT Consultants" again), all practices that have "Port Huron" in their name display.



No Preference

Note: Most sites that have more than one provider will also display "1-No Preference" as a provider. Therefore, you can select this option if you do not have a specific provider for that office that you want to treat the patient.

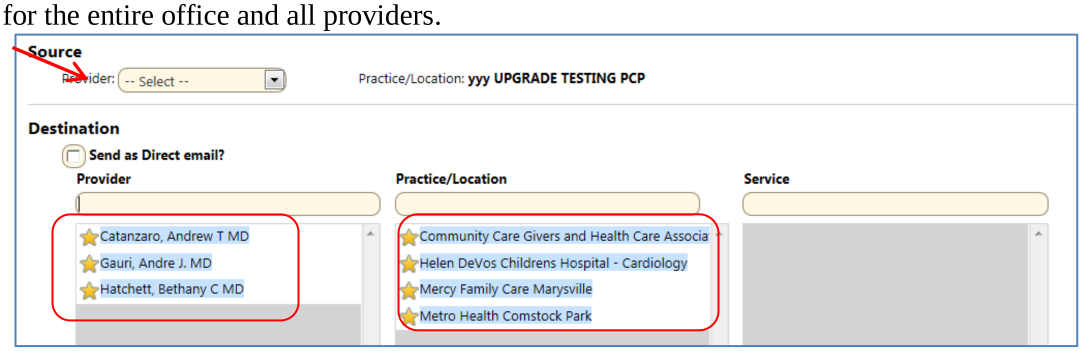


Preferred Provider Lists

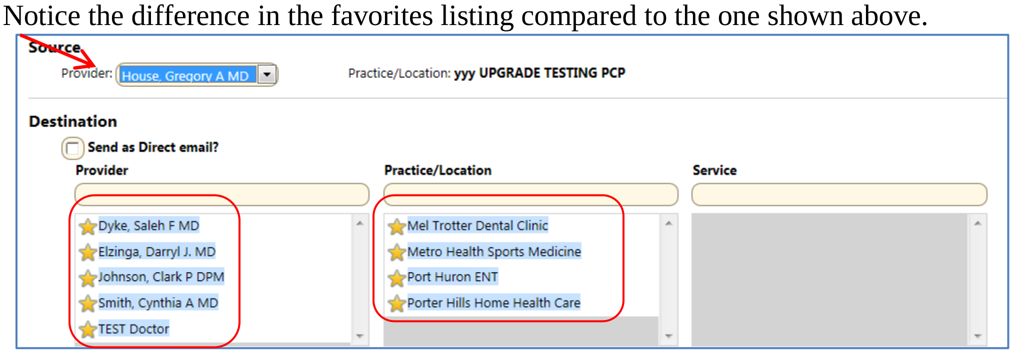
As the GLHC Community continues to expand throughout the State, the list of available providers also expands. Practices now have the ability to configure a favorites list of providers who are part of their Preferred Network or where they frequently refer patients. This ability also enhances efficiency and improves workflow whether the User has a Preferred Network or not.

Note: A preferred referral provider list can be created and maintained for a **practice** or for **individual providers**. This list is typically created by an Administrator in the office as all staff in the office will see the same list. Therefore, a User cannot create their own favorites list.

Example for Preferred list for the entire practice: Since no specific referring provider has been selected in the image below, the word "**-Select-**" displays in the Referral Source. Therefore, the displayed Preferred List is for the entire office and all providers.

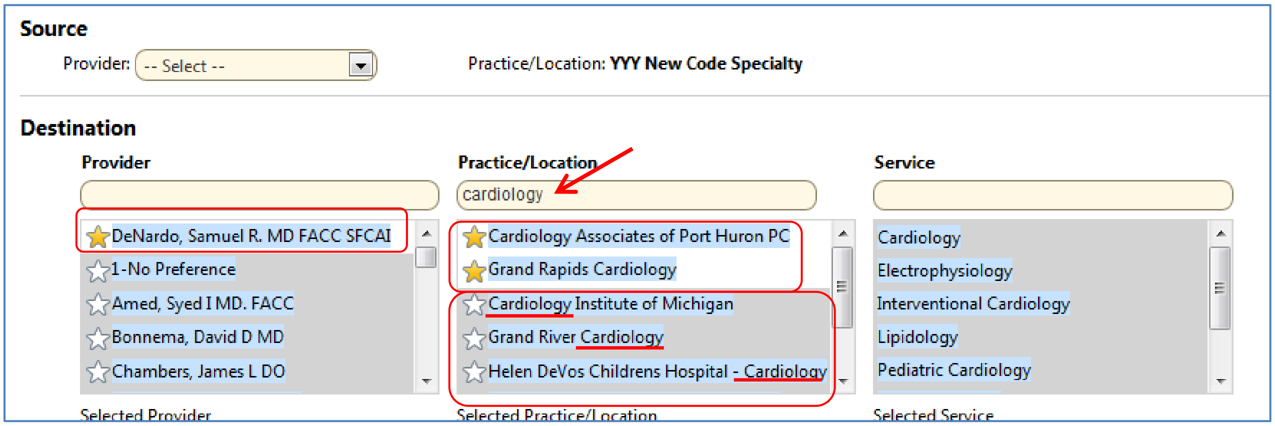


Example for Preferred list configured for **a specific provider** (Dr. Gregory House) within the same practice. Notice the difference in the favorites listing compared to the one shown above.



Note: It is important to note that the **Preferred Provider** feature does not prohibit a practice from referring to other providers in the GLHC Community Directory. It simply moves the practice-specified favorites to the top of the list when performing a search.

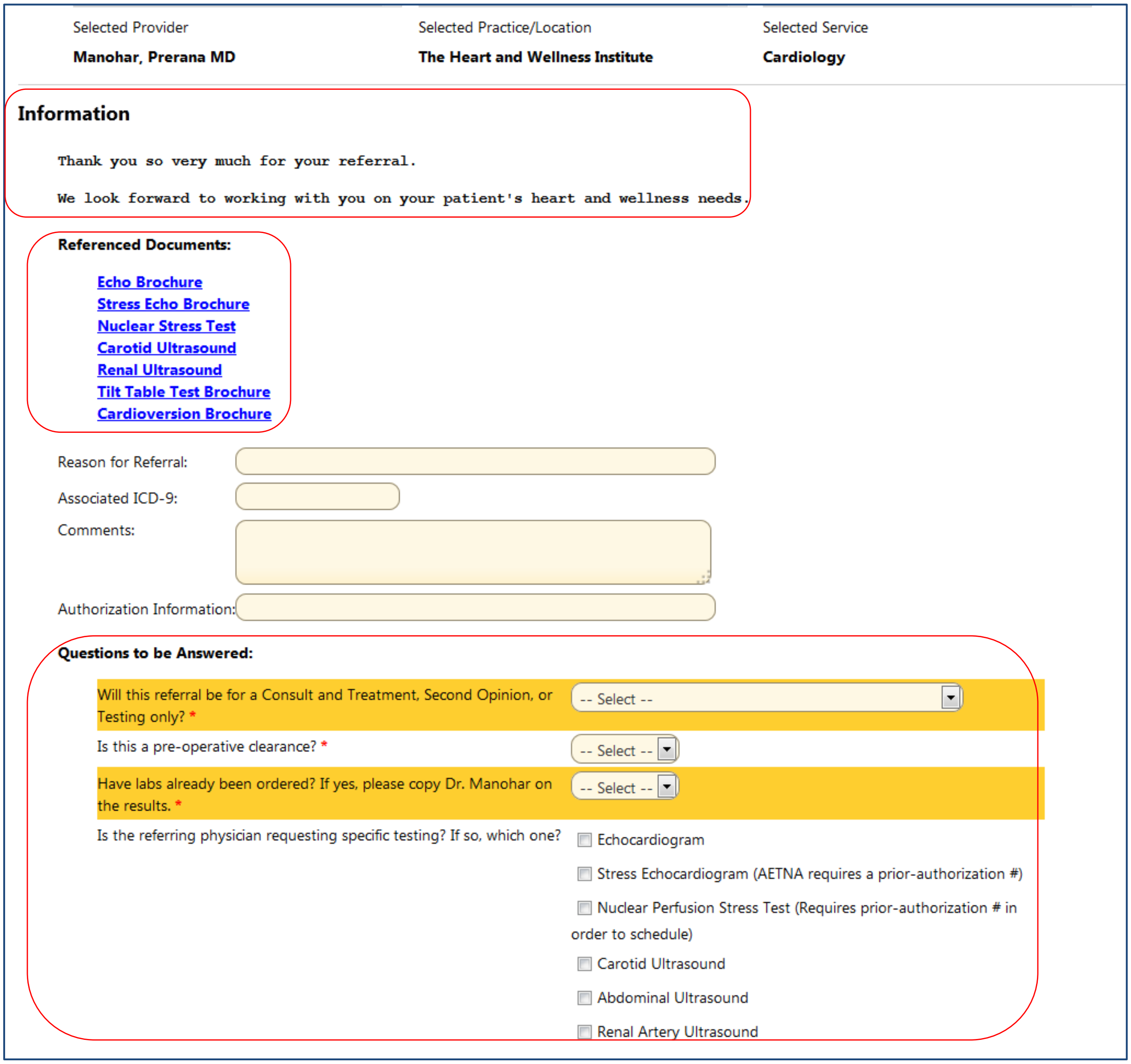
Example: When the word "cardiology" is entered for the **Practice/Location**, the preferred locations appear at the top of the list and all other offices with the word "cardiology" in their name appear in alphabetical order <u>below</u> the preferred two offices, as well as their associated providers in alphabetical order. This allows a User to select and refer to providers who are not currently on their preferred list if needed.



Receiving Provider's HOMEPAGE

Each site has the ability to create their own Homepage. These are similar to what is on a Referral fax sheet, but can also include other valuable information including maps to their locations, patient handouts, criteria for accepting referrals and types of insurance. Specific information from the Receiving office appear on the screen under three categories:

1) **Instructions or announcements**, 2) **Referenced documents** and 3) **Questions to be Answered**.



Selected Provider	Selected Practice/Location	Selected Service
Manohar, Prerana MD	**The Heart and Wellness Institute**	**Cardiology**

Information

Thank you so very much for your referral.

We look forward to working with you on your patient's heart and wellness needs.

Referenced Documents:

- Echo Brochure
- Stress Echo Brochure
- Nuclear Stress Test
- Carotid Ultrasound
- Renal Ultrasound
- Tilt Table Test Brochure
- Cardioversion Brochure

Reason for Referral:

Associated ICD-9:

Comments:

Authorization Information:

Questions to be Answered:

Will this referral be for a Consult and Treatment, Second Opinion, or Testing only? * -- Select --

Is this a pre-operative clearance? * -- Select --

Have labs already been ordered? If yes, please copy Dr. Manohar on the results. * -- Select --

Is the referring physician requesting specific testing? If so, which one?

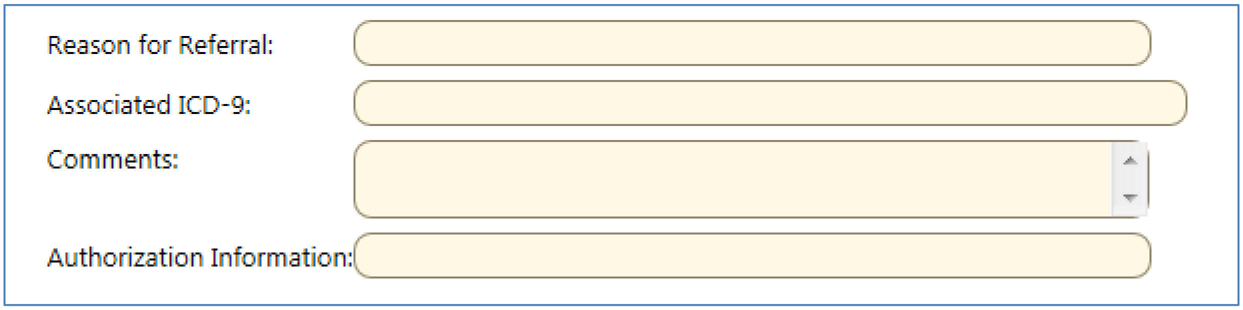
- Echocardiogram
- Stress Echocardiogram (AETNA requires a prior-authorization #)
- Nuclear Perfusion Stress Test (Requires prior-authorization # in order to schedule)
- Carotid Ultrasound
- Abdominal Ultrasound
- Renal Artery Ultrasound

Information: Can include pertinent and up-to-date information regarding the office, criteria when making a referral, what types of insurance they accept, etc. This can be updated at any time so it is important to read this section prior to making the referral.

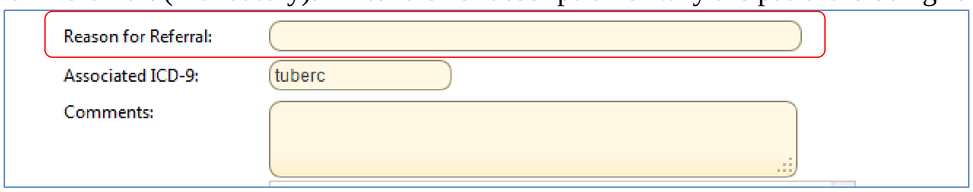
Reference Documents: Can include maps to the locations, new patient handouts, criteria for making a referral, various brochures, etc. Some can be for the patient. Others are for your education/benefit.

Note: It is important to review the **Information** and **Referenced Document** sections as these 2 sections can be updated at any time by the receiving office.

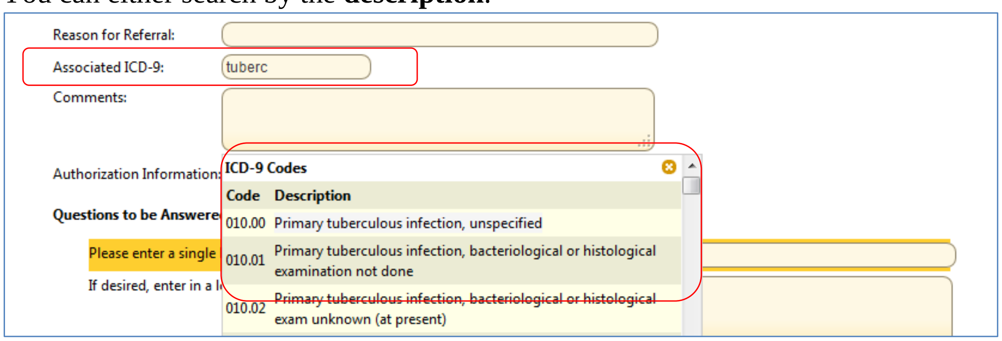
There is also one portion that is the same for every Homepage that includes 4 sections:



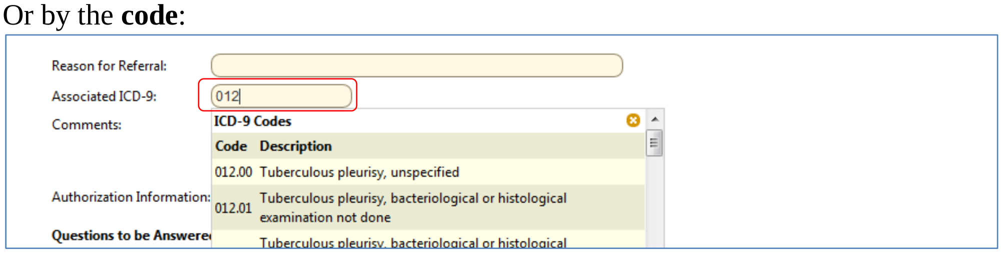
1. **Reason for Referral**. (Mandatory). Enter a brief description of why the patient is being referred.



2. If known, add an **ICD9 code** at the time of referral creation. The information can be entered in the Information section of the referral, in the Associated ICD-9 text box.
    a. You can either search by the **description**.

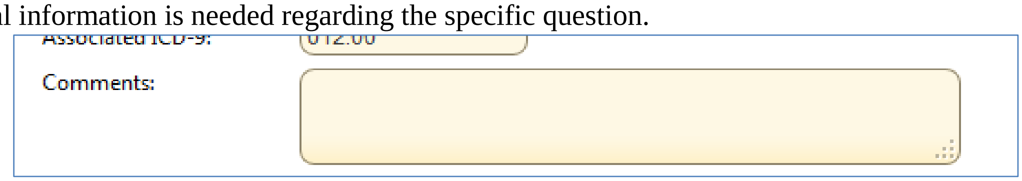


    b. Or by the **code**:



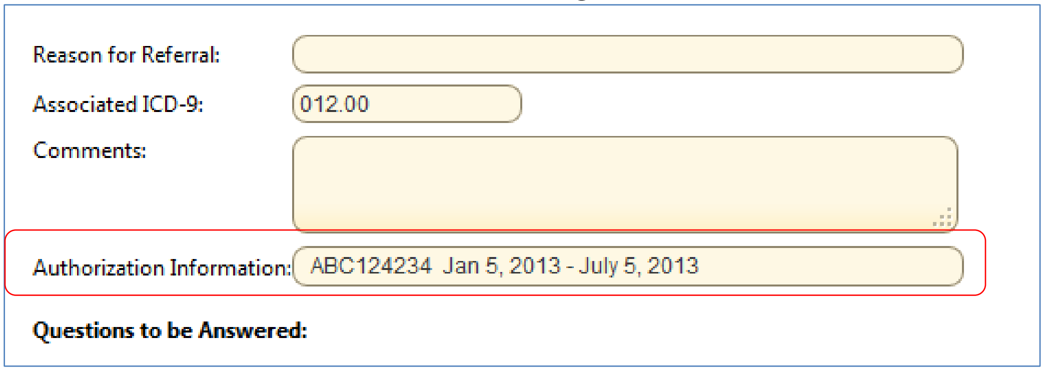
3. **Comments**

Enter additional information in the Comments section. Note: Some questions will reference this section if additional information is needed regarding the specific question.



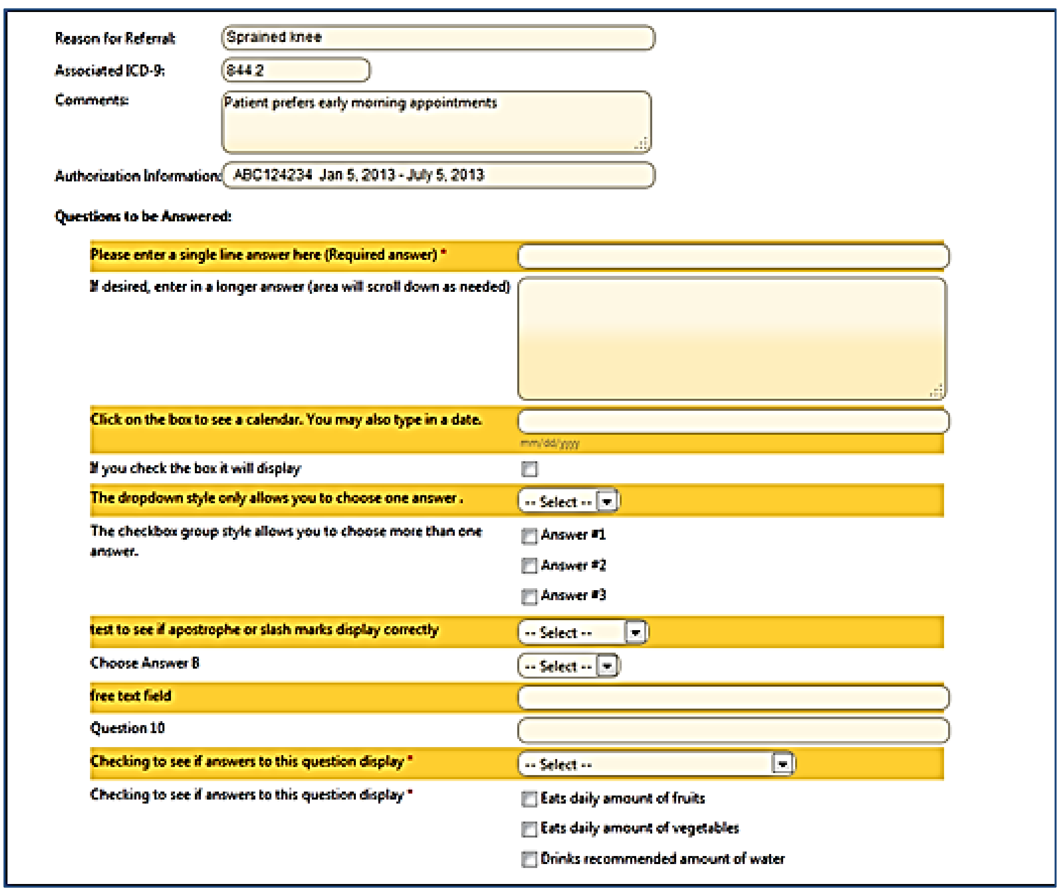
4. **Authorization** Information

If the referral requires prior authorization, enter the authorization number and date-range (if applicable). This is a free text section so both the number and date range can be entered.

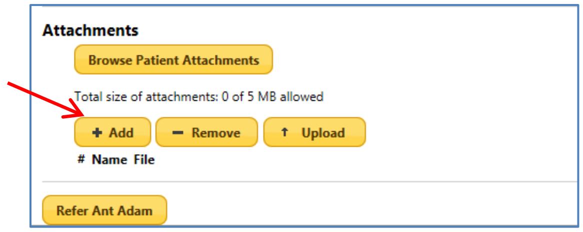


Questions to be Answered:

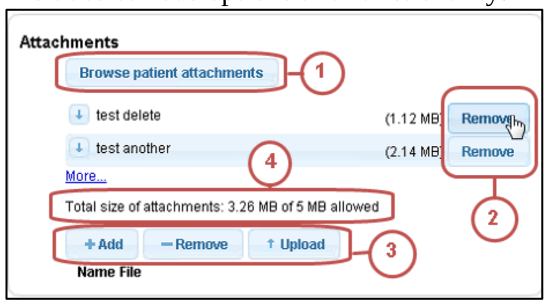
5. Answer the questions from the Receiving office. Required questions are noted with a red *. You will not be able to send the referral and will receive an error message if you do not answer these questions.



6. If applicable, you can attach document files to the referral by choosing "**Add**" under the **Attachments** section.



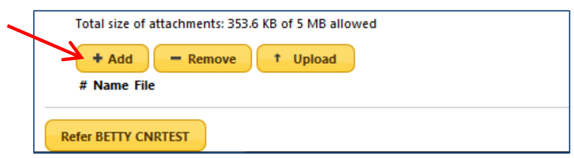
The **Attachments** section includes various options and functionality:



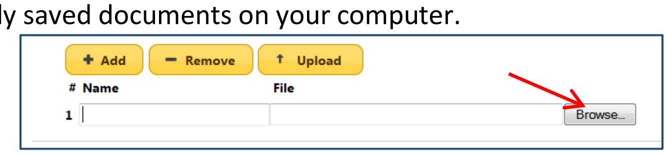
1. **Browse patient attachments:** (NOT AVAILABLE AT THIS TIME)
2. **Remove:** Allows users to remove an attachment from a referral.
3. **Add, Remove, Upload:** Provides increased manageability for adding new documents, removing the last attachment, and uploading attachments.
4. Displays the total size of attachments to manage the 5 MB attachment limit for each referral.

Attaching documents

1. Select "**+Add**".



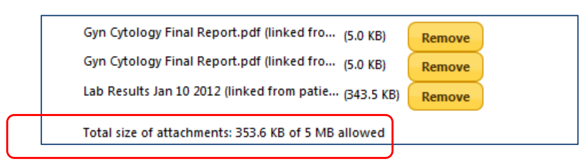
2. Search for previously saved documents on your computer.



3. Make sure to <u>NAME the document</u> and then select "**Upload**".

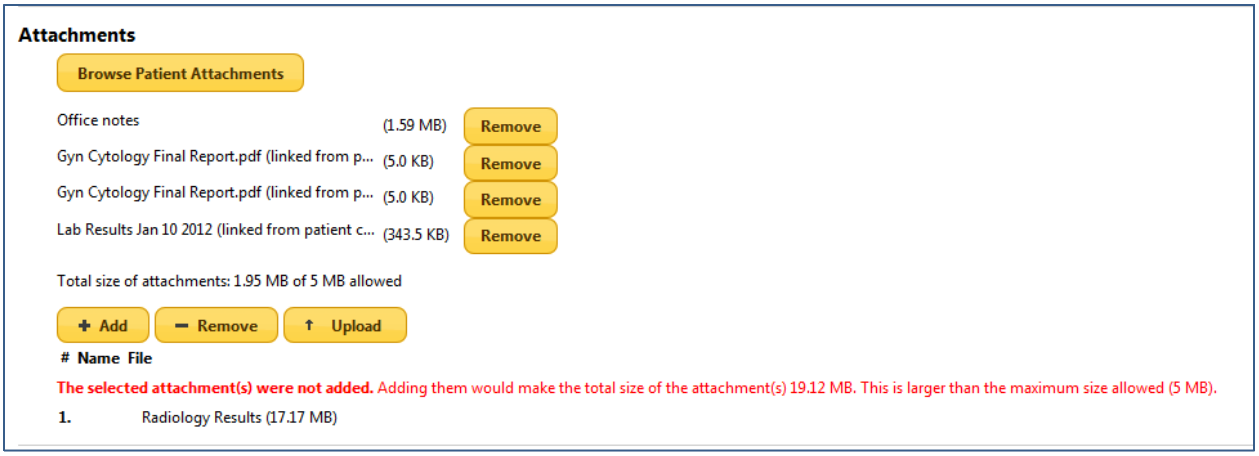
Note: Size Limitation for Attachments.

There is an overall maximum **<u>10MB limit</u>** to all attachments for each referral.
As you add attachments the **Total size of attachments** displays, allowing you to confirm that you are within the **10MB max**.



You will also receive a warning message once you have exceeded the 10MB maximum.

Note: Any attachment exceeding the limit will NOT be included in the referral (see below)



You can also click on "**Remove"** to delete any attachment prior to sending the referral.

Note: When adding the attachment, you must add a descriptive name or you will not be able to send the referral.

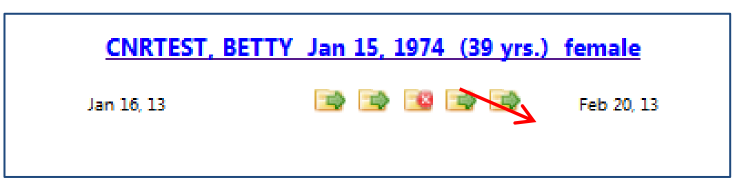
Additionally, clicking Add but not actually attaching anything will prevent the referral from being sent. If you receive this error message, simply click on "Remove Attachment".

Referring the Patient

You have the option of sending the referral by selecting "**Refer (Patient Name**)" at the top or bottom of the referral Homepage screen.

Click Refer <Patient Name>.

The referral has been sent, and the Referral Worklist appears. Initial Status is "**Requested**", and will change to "**Received**" upon arrival at referred location.
The Patient Record also adds an event to the Timeline representing this referral. Hovering over each folder provides the date/time, status and location of the referral. Click on each folder to open the specific referral.



Refer to **6. Managing the SENT Referrals Worklist** and ***7. Acting on SENT Referrals*** Quick Reference Guides for more information.