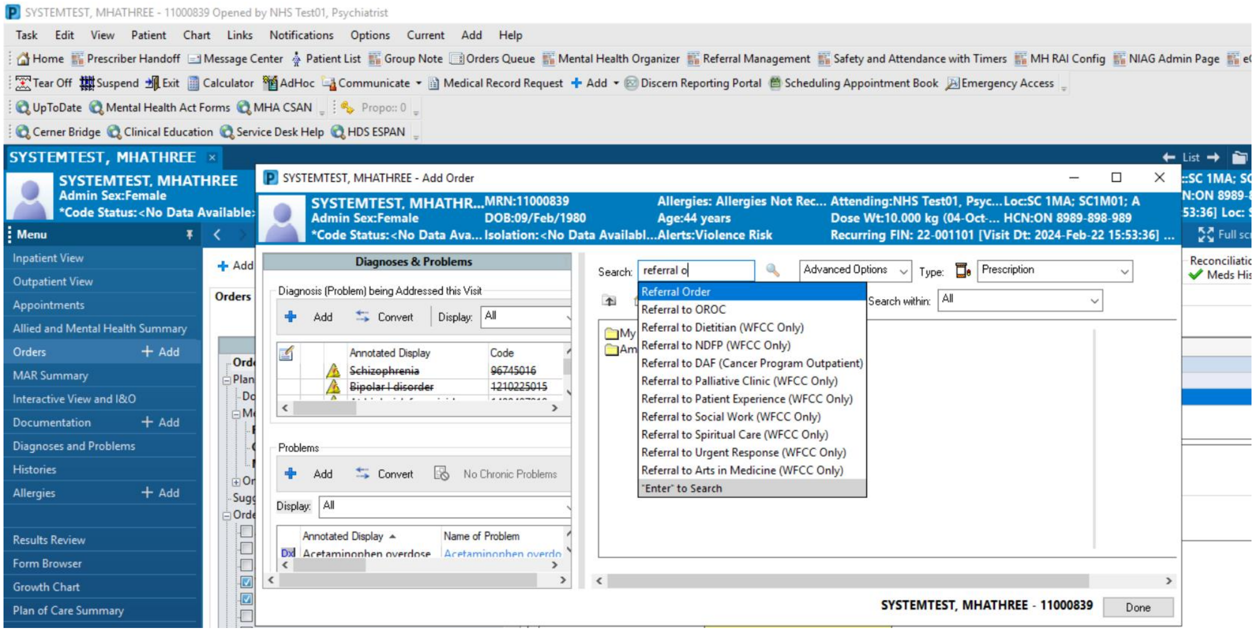
Referral Management

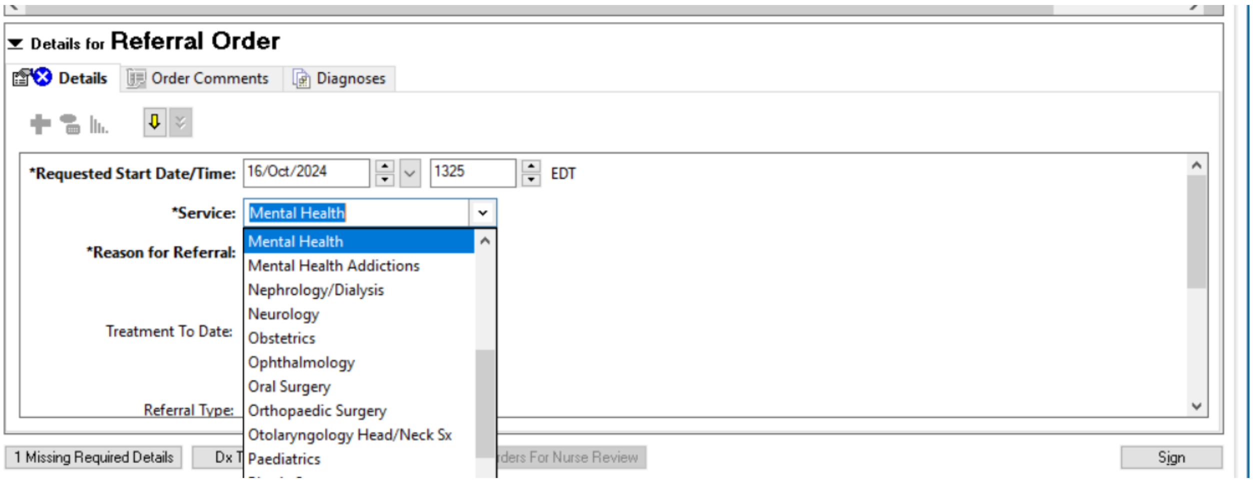
How to place Referral order?

- Log into Powerchart
- Open the patient chart and single left click on +Add sign besides Orders tab from left side blue menu
- Search for Referral Order in the search window

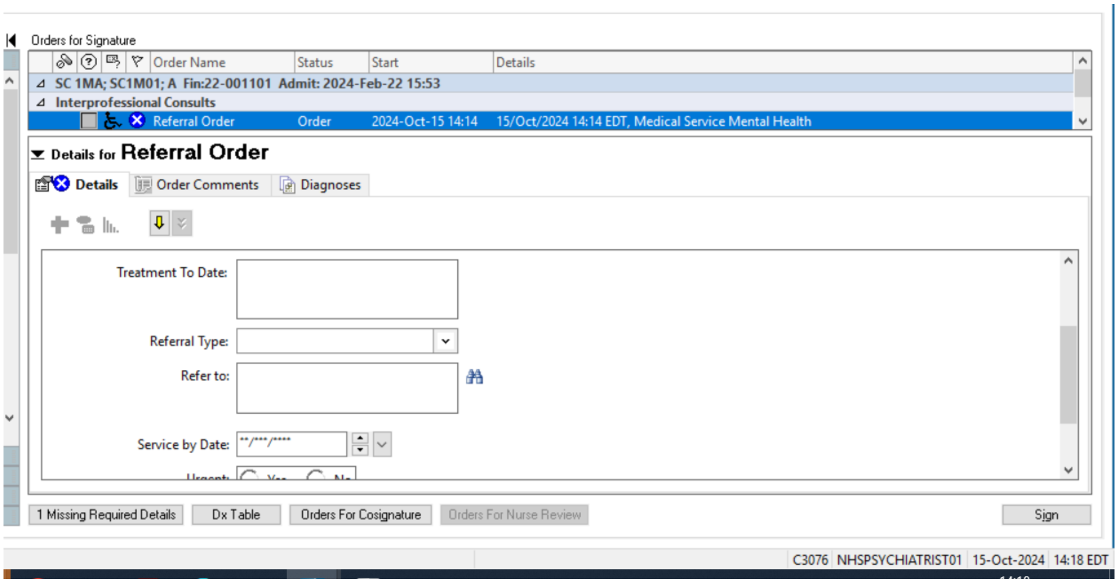


- Single left click on the Done on the bottom right of the screen
- Referral order window opens

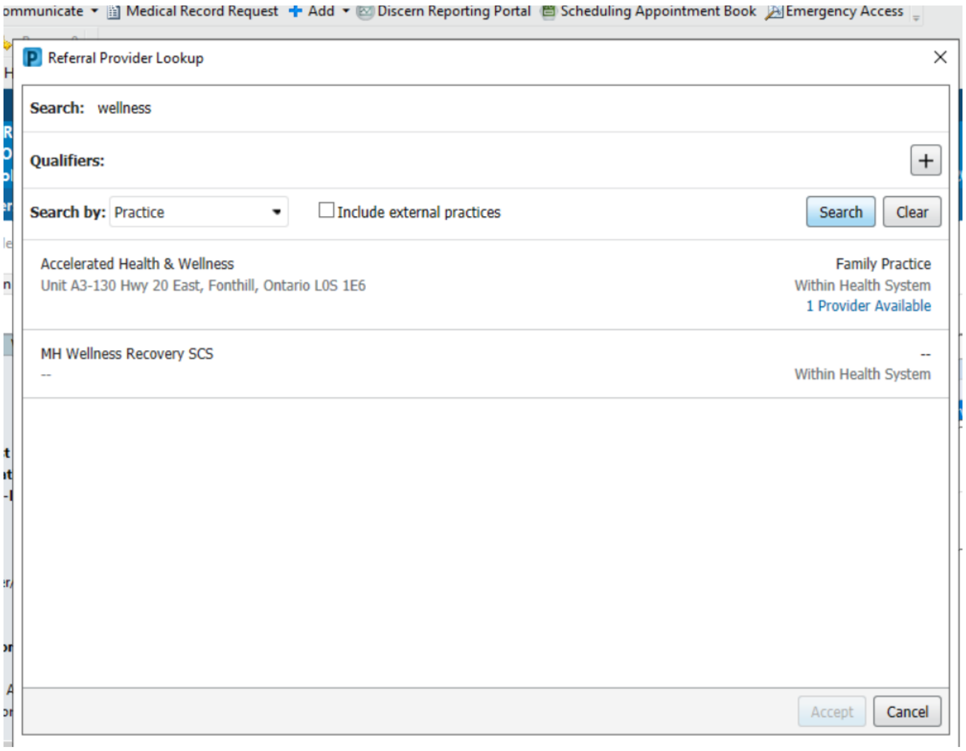
- In the Service field choose ‘Mental Health’ for mental health and ‘Mental Health Addictions’ for OP addictions



- In the Refer to: option, single left click on the binoculars on the right side of the box



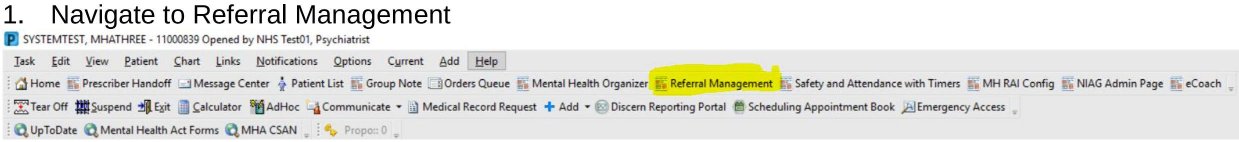
- Referral Provider Lookup Window Opens
- Choose the Provider/Practice depending on where you want to send referral and search for it

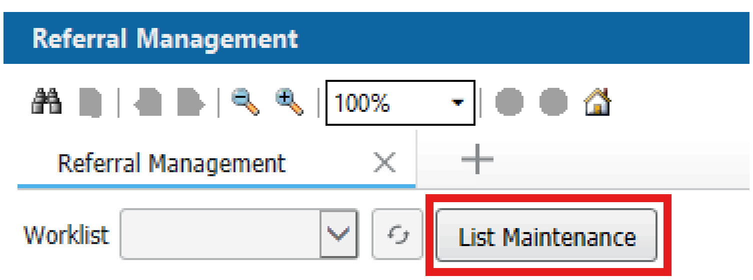


- Once you select the Clinic/Provider, Accept button becomes available
- Single left click on Accept button

Creating Incoming/Outgoing Referral Lists

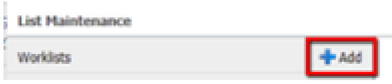
1. Navigate to Referral Management



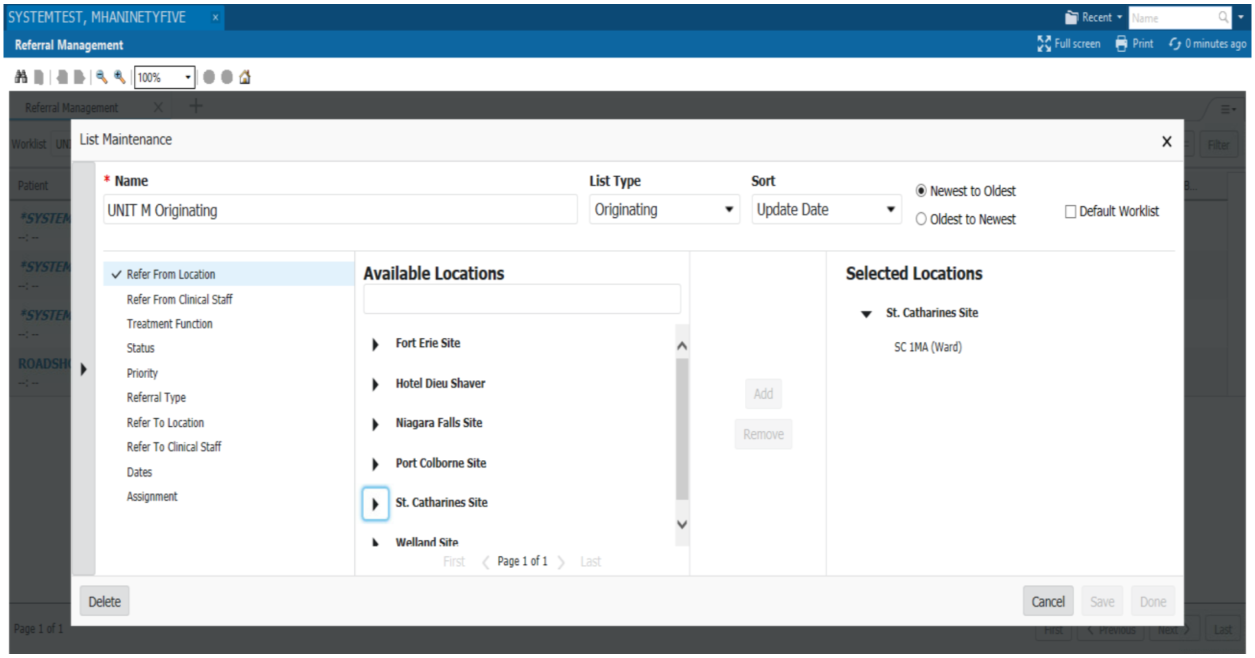


2. Go to List Maintenance

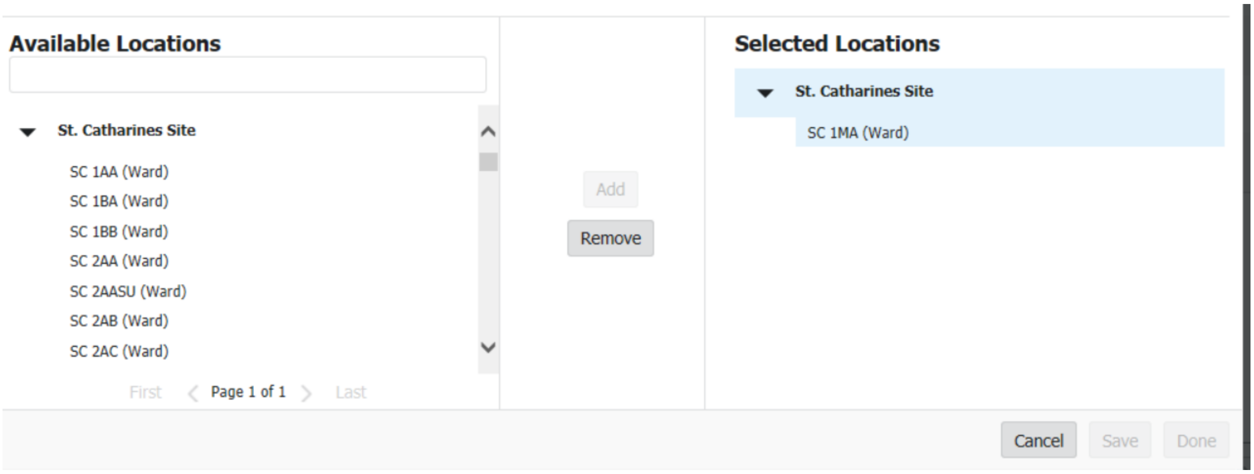
3. Click Add



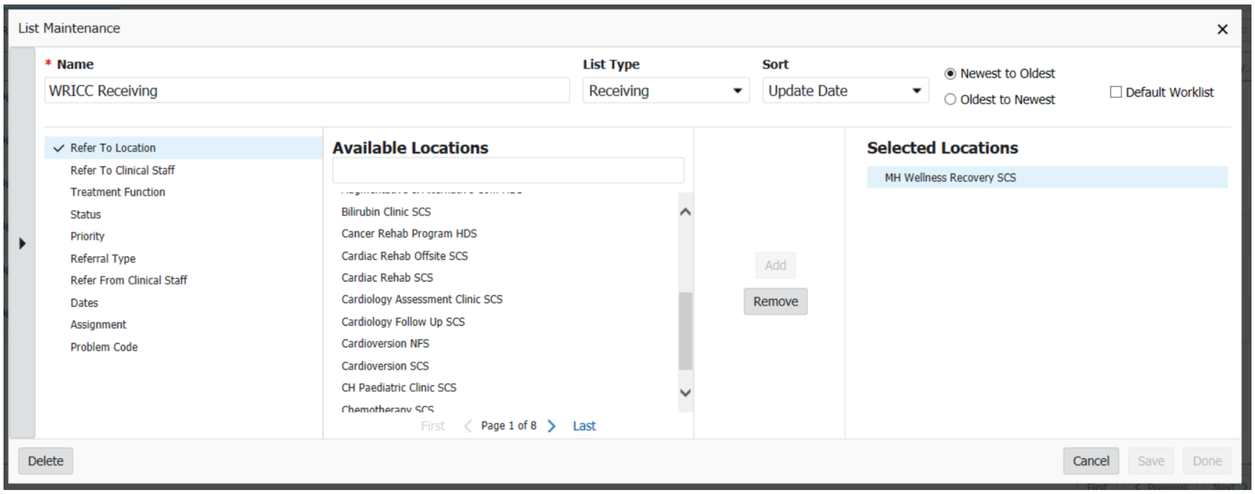
4. You need to create an originating and a receiving list. Name your list to indicate which one it is.



5. After choosing the type of list and naming it, you need to select the locations to associate. Click the locations you want added and click "Add" to move them over to the selected locations box.



6. Similarly you can create receiving list as shown below.

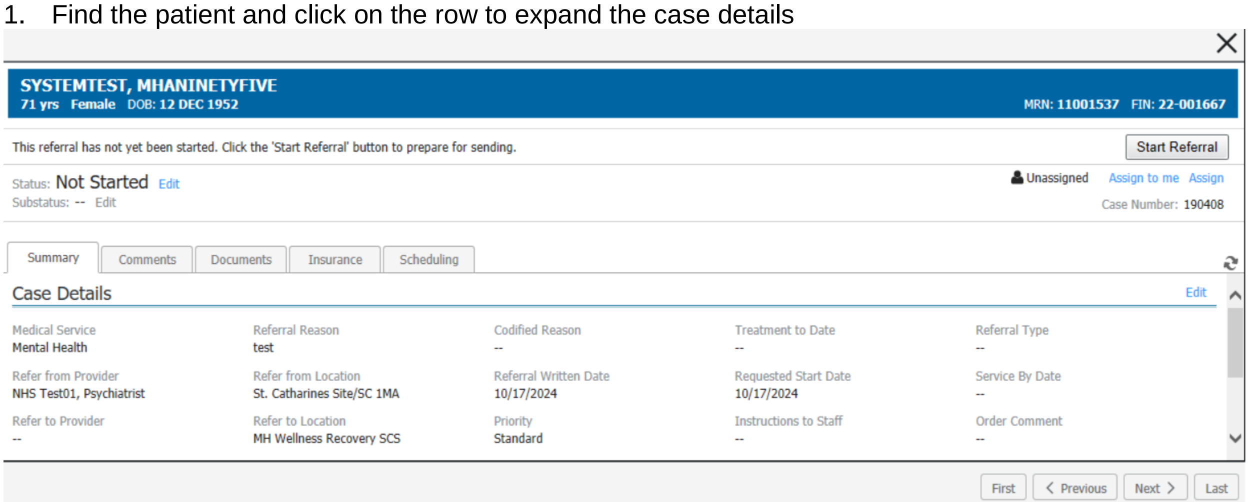


7. You can add additional criteria to the list like specific providers, statuses, etc. by clicking each on each item in the left-hand column and selecting the check box

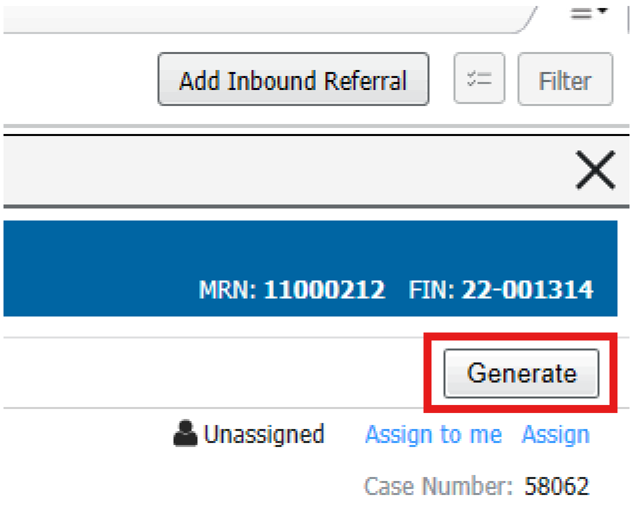
8. When you are done creating your list, select Done and close out of list maintenance

Sending an Internal Referral

1. Find the patient and click on the row to expand the case details



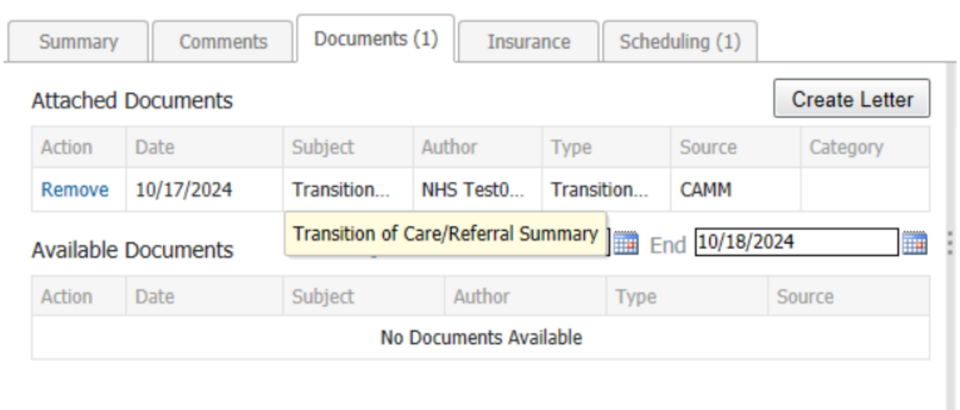
2. Single left click on Start Referral button.



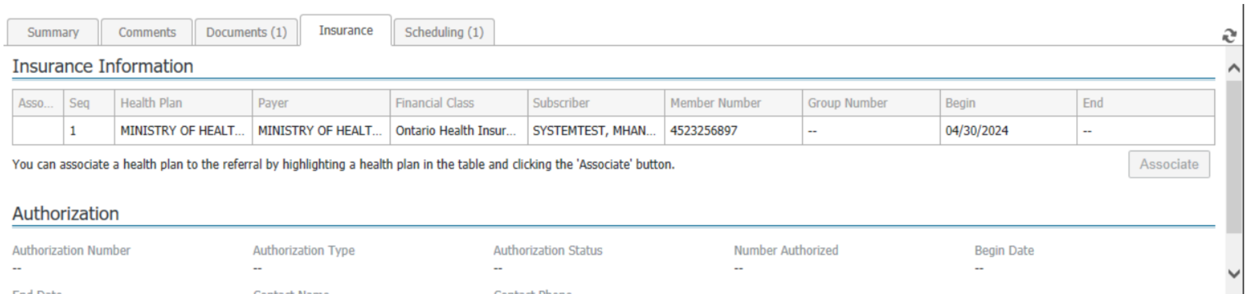
3. In the upper right-hand corner click “Generate”

4. If the provider didn’t specify where to send the referral or more information is needed, on the Summary tab click “Edit” and fill in any of the missing information

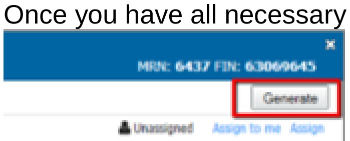
5. If there is a document that needs to be attached to the referral, find the appropriate document on the documents tab and select “Add”. That will attach the document to this case, so the receiving office knows it is relevant.



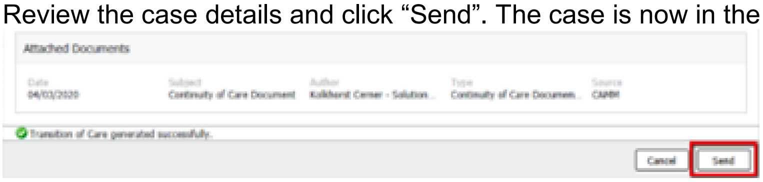
6. If you need to obtain an authorization for the referral, go to the Insurance tab and highlight the patient's health plan and click "Associate". Once the health plan is associated to the case the Edit button above the Authorization section becomes available. Click "Edit".



7. Input the authorization information for this case and save
8. Once you have all necessary information, click "Generate" in the upper right-hand corner



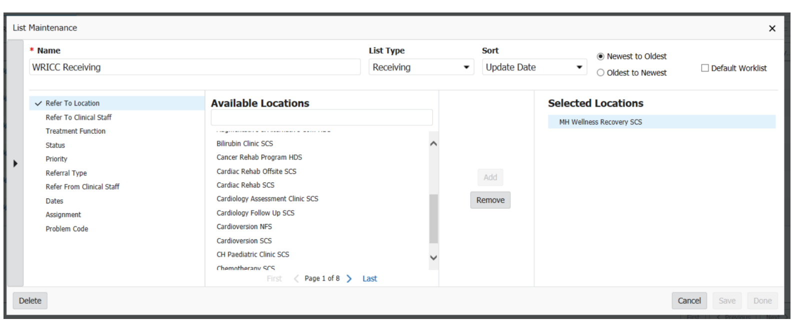
9. Review the case details and click "Send". The case is now in the receiving office's queue



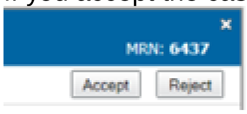
10. The referral will be in a "Pending" status until the receiving office accepts or rejects it

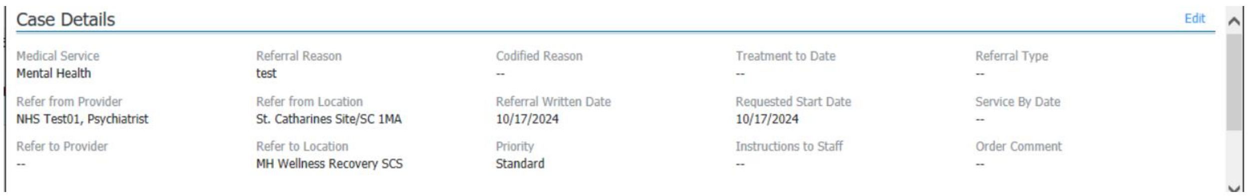
Receiving an Internal Referral

1. Create custom list for Receiving location (Explained in detail in previous steps)



2. Find the patient and click on the row to expand the case details
3. In the upper right-hand corner click either “Accept” or “Reject”
4. If you reject a case, the referring office will see a status of “Rejected” and take the appropriate actions on it
5. If you accept the case, you will start working the referral

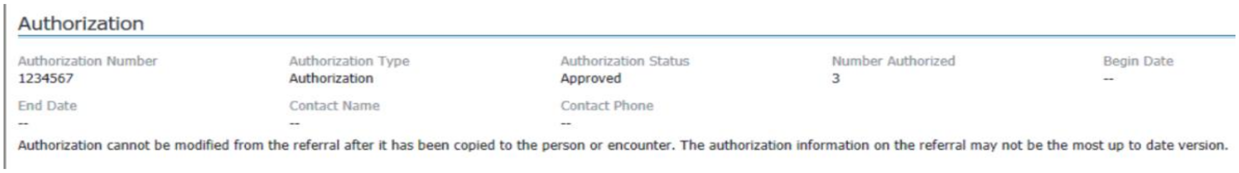




6. In the summary tab, review the information from the referring office. If they didn’t specify a specific provider and you would like to assign one, edit the case

7. Next, review the Comments, Documents and Insurance tabs

8. On the Insurance Tab, you will see a message that says the authorization has been copied to the person or encounter level and cannot be modified. If you need to update the authorization information, you will navigate to the person’s registration view and make the update there.

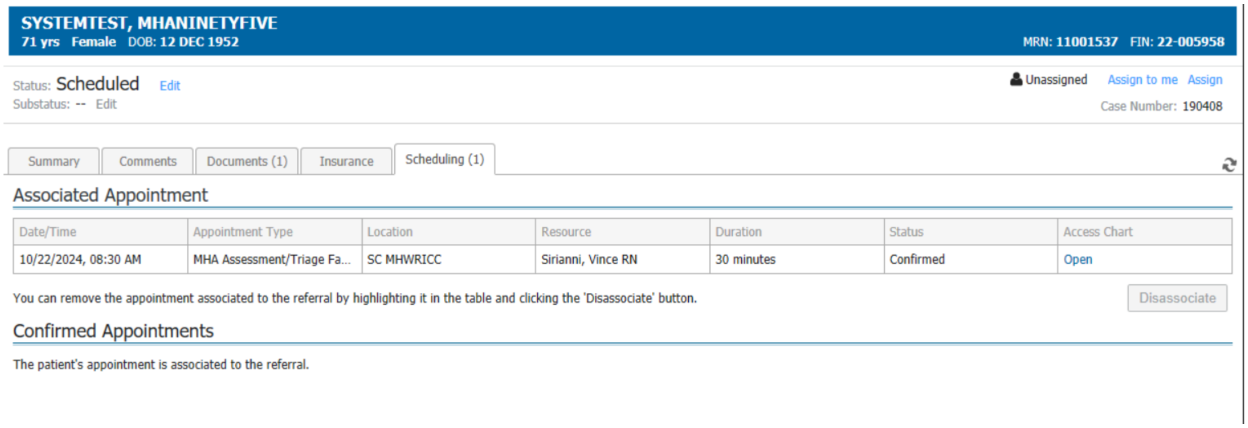


9. Once you have the information you need, navigate to the Schedule Tab and click “New Appointment”

10. That will take you to your schedule view where you will schedule the appointment like normal

11. Once you have confirmed the appointment, go back to your Referral Management View

12. Within the schedule tab, click the refresh button and you will see the scheduled appointment associated to the case

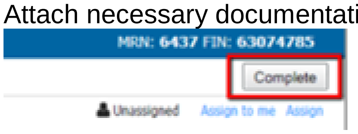


13. If you had already scheduled an appointment for this patient, it will show in the Confirmed Appointments section. Instead of clicking "New Appointment", you can select the existing appointment from the list and associate it to the case.

14. After an appointment is attached to the case, the status will show as "Scheduled" with the date and time of the appointment. If the patient no shows or cancels the appointment, the status will update to "Pending Reschedule".

15. When the patient arrives for the appointment and is checked in, the status of the referral will update to "Patient Seen".

16. Attach necessary documentation to the case and update the status of the case to "Complete"



17. The referring office will review the documentation and update the status to "Closed"