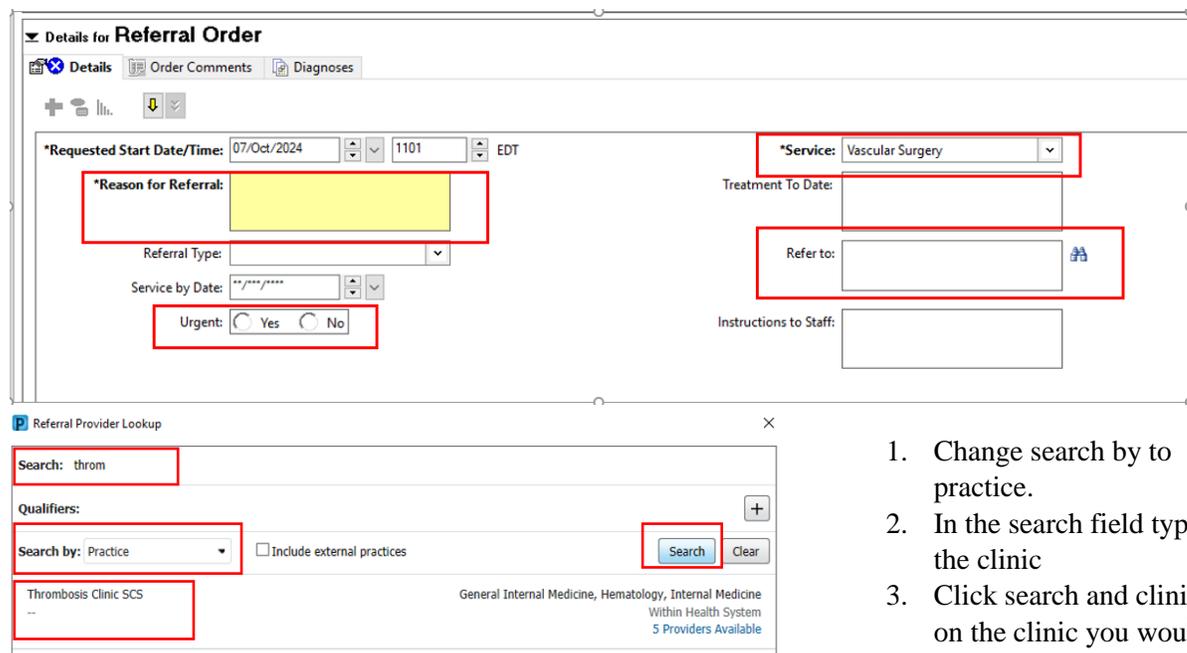## REFERRAL: SENDING AN INTERNAL REFERRAL

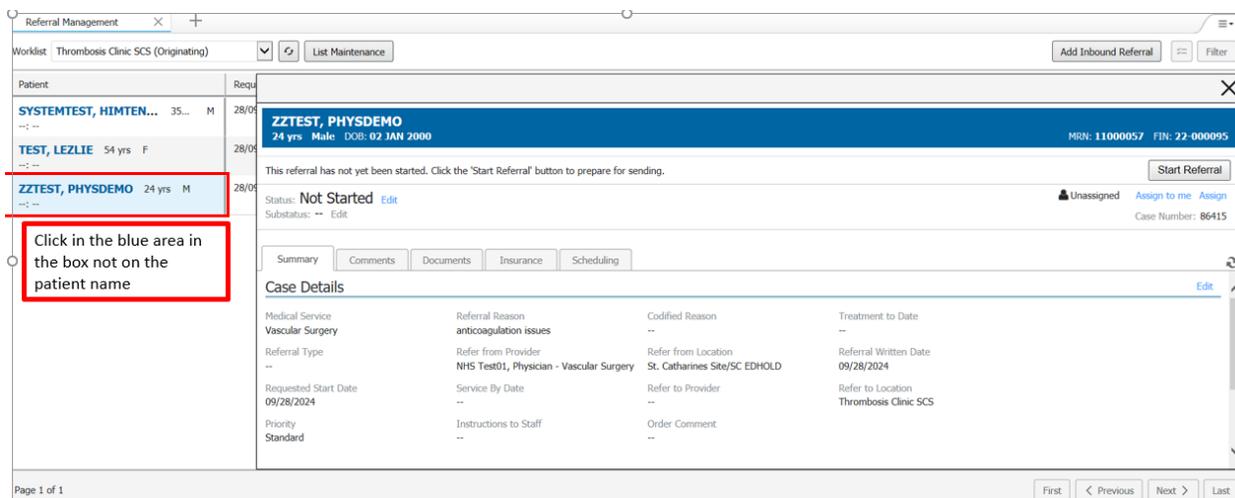1. Provider will place an "Referral Order"
   Key Points:
   1. complete Service by looking at the drop down
   2. complete Reason for Referral
   3. complete refer to *see screen shot below
   4. complete urgency
   5. complete other fields as appropriate

1. Change search by to practice.
2. In the search field type the clinic
3. Click search and clinic on the clinic you would like to refer to.

2. From your Referral Originating List: Find the patient and click on the row to expand the case details. Click the start Referral Button.

3. 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
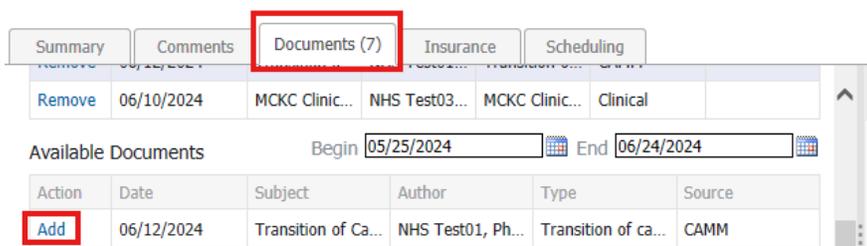

4. If there is a document that needs to be attached to the referral, find the appropriate document on the documents tab and select "Add". That will attach the document to this case, so the receiving office knows it is relevant.
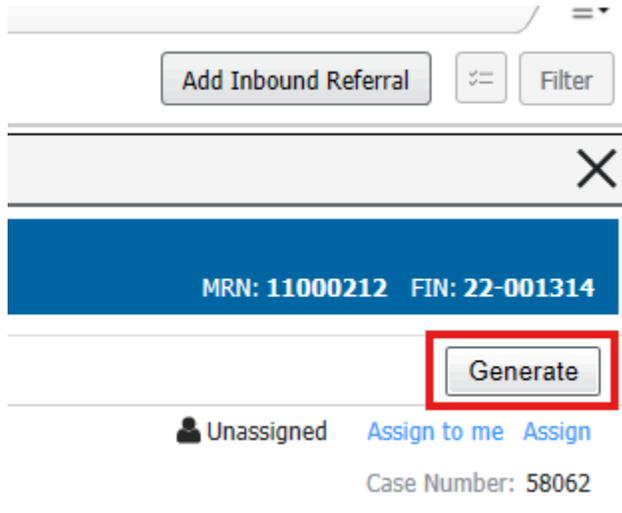

5. Once all the information is correct. In the upper right-hand corner click "Generate"

6. Review the case details and click "Send". The case is now in the receiving office's queue
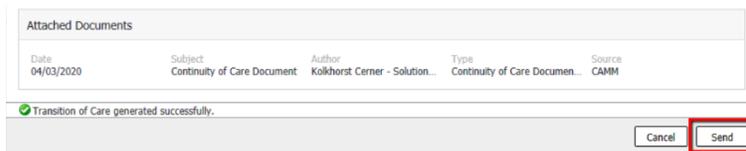
7. The referral will be in a "Pending" status until the receiving office accepts or rejects it