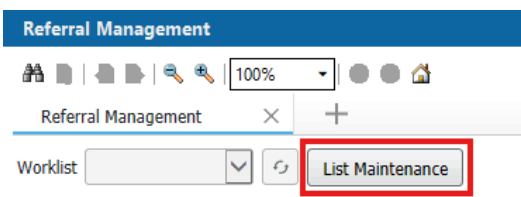


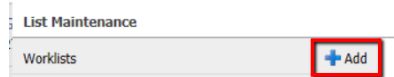
### PSYCHIATRISTS

#### Creating Incoming/Outgoing Referral Lists

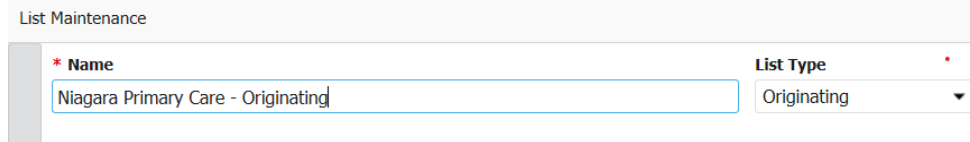
1. Navigate to Referral Management
2. Go to List Maintenance



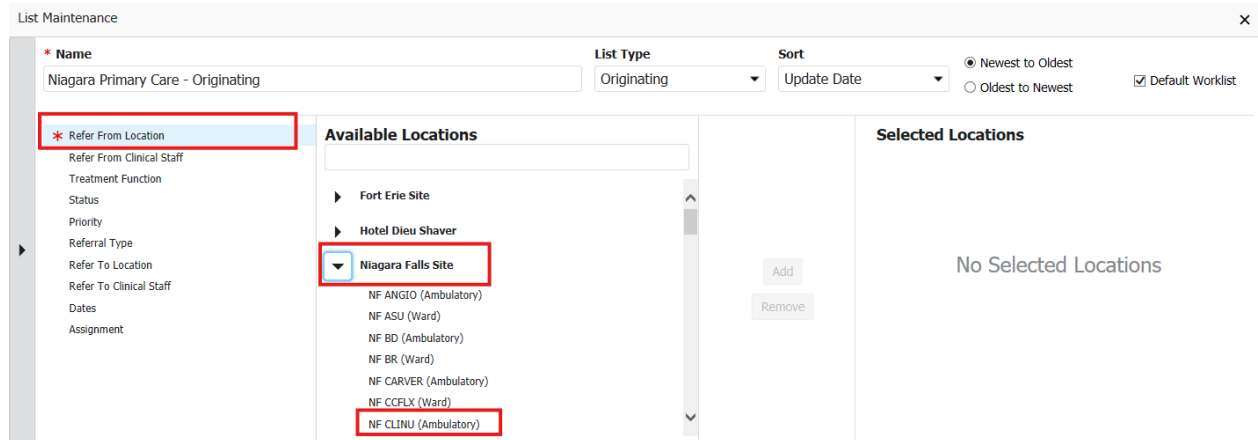
3. Click Add



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.





# REFERRAL MANAGEMENT

## HOSPITAL INFORMATION SYSTEM (HIS)

6. 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.
7. 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. In the upper right-hand corner click "Generate"

MRN: 11000212 FIN: 22-001314

**Generate**

Unassigned Assign to me Assign

Case Number: 58062

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

Summary Comments Documents (7) Insurance Scheduling

Case Details **Edit**

Medical Service Orthopaedic Surgery	Referral Reason consult	Codified Reason --	Treatment to Date --	Referral Type --
Refer from Provider NHS Test01, Physician - Nephrology	Refer from Location Niagara Falls Site/NF GAC	Referral Written Date 04/19/2024	Requested Start Date 04/19/2024	Service By Date --

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.

Summary Comments **Documents (7)** Insurance Scheduling

Remove 06/10/2024 MCKC Clinic... NHS Test03... MCKC Clinic... Clinical

Available Documents Begin 05/25/2024 End 06/24/2024

Action	Date	Subject	Author	Type	Source
<b>Add</b>	06/12/2024	Transition of Ca...	NHS Test01, Ph...	Transition of ca...	CAMM

- 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".

Insurance Information

Asso...	Seq	Health Plan	Payer	Financial Class	Subscriber	Member Number	Group Number	Begin	End
	1	AETNA	Aetna	Commercial	SUMMERS, JOHNNY...	1234567	--	04/03/2019	--

You can associate a health plan to the referral by highlighting a health plan in the table and clicking the 'Associate' button.

Associate

Authorization Edit

Authorization Number	Authorization Type	Authorization Status	Number Authorized	Begin Date
--	--	--	--	--

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

MRN: 6437 FIN: 63069645

Generate

Unassigned Assign to me Assign

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

Attached Documents

Date	Subject	Author	Type	Source
04/03/2020	Continuity of Care Document	Kolkhorst Cerner - Solution...	Continuity of Care Documen...	CAMM

Transition of Care generated successfully.

Cancel Send

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

### Receiving an Internal Referral

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

MRN: 6437

Accept Reject

- 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.

Summary | Comments | Documents | Insurance | Scheduling

Case Details Edit

Medical Service Pulmonology	Referral Reason Sleep Apnea	Codified Reason G47.30 - Sleep apnea, unspecified	Treatment to Date --	Referral Type Consult Only
--------------------------------	--------------------------------	--	-------------------------	-------------------------------

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

Authorization

Authorization Number 1234567	Authorization Type Authorization	Authorization Status Approved	Number Authorized 3	Begin Date --
End Date --	Contact Name --	Contact Phone --		

Authorization cannot be modified from the referral after it has been copied to the person or encounter. The authorization information on the referral may not be the most up to date version.

- Once you have the information you need, navigate to the Schedule Tab and click "New Appointment"

Summary | Comments | Documents | Insurance | Scheduling

Associated Appointment

No Appointment Associated

New Appointment

- That will take you to your schedule view where you will schedule the appointment like normal
- Once you have confirmed the appointment, go back to your Referral Management View
- Within the schedule tab, click the refresh button and you will see the scheduled appointment associated to the case

Summary | Comments | Documents | Insurance | Scheduling (1)

Associated Appointment

Date/Time	Appointment Type	Location	Resource	Duration	Status
04/09/2020, 12:00 PM	OPD Established Patient	OPD GI	OPD GI	30 minutes	Confirmed

You can remove the appointment associated to the referral by highlighting it in the table and clicking the 'Disassociate' button.

Disassociate



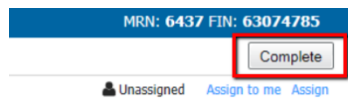
# REFERRAL MANAGEMENT

## HOSPITAL INFORMATION SYSTEM (HIS)

- 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”.

Indic...	Patient	Insurance	Referred By	Requested Service	Referred To	Status
	<b>SUMMERS, JOHNNY CERNER</b> 45 yrs M DOB: Jan 11, 1975	AETNA	Cerner Test, Physician... 4/3/2020 12:29pm	Pulmonology Sleep Apnea	OPD Pulmonary --	Scheduled 4/9/2020 12:00pm

- When the patient arrives for the appointment and is checked in, the status of the referral will update to “Patient Seen”.
- Attach necessary documentation to the case and update the status of the case to “Complete”



- The referring office will review the documentation and update the status to “Closed”

### Sending an External Referral

- Find the patient and click on the row to expand the case details
- In the upper right-hand corner click “Start Referral”
- 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
- If you decide you need to send the referral outside of the health system, when searching for a provider select “External” and choose a provider

Provider Search

Search: |

Qualifiers:

Search by: Practice Distance: --  Include external practices

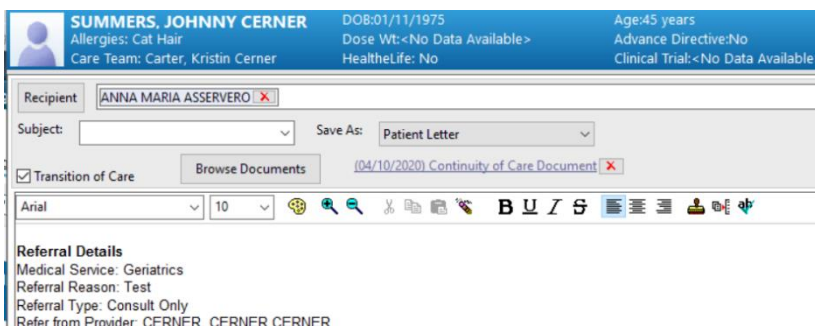
- Go through each tab and add the appropriate details
- Once you have the information needed, click “Generate”
- Since you are sending this referral outside of the organization, you are prompted to go to PowerChart and create a letter



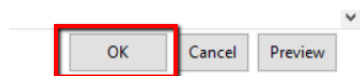
- Navigate to PowerChart and click “Referral Management”



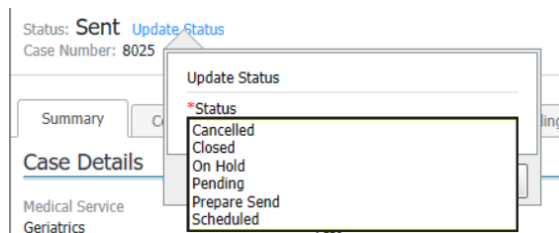
- Find your patient on your originating list, open the case and click “Generate” again
- A Provider Letter will automatically pop up with the case information populated and a Continuity of Care Document attached



- The physician you are referring to will automatically pull into the Recipient field with their contact information. Click “Recipient” to review the information.
- If the provider is set up for direct messaging, the message will be sent to their inbox. If the provider’s fax was provided, then it will be faxed to them. If the provider only had an address on file, then the letter will print out and needs to be mailed.
- Once you have the information needed within the letter, click “Ok” to send it

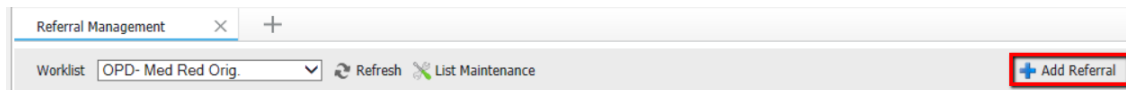


- You will manually update the status of the case once you hear back from the receiving office



### Receiving an External Referral

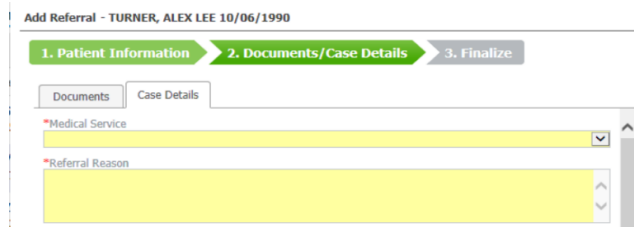
1. If you received an outside referral, click “Add Referral” within Referral Management



Referral Management x +

Worklist OPD- Med Red Orig. Refresh List Maintenance **+ Add Referral**

2. Search for your patient in Smart ID using the First Name, Last Name, Date of Birth and Gender. Select the correct one and click “Accept”. If you can’t find your patient, click “Create New” and go through the process to add a patient and then start with step 1 again.
3. Go to the Case Details tab and fill in the required fields based on the paper referral



Add Referral - TURNER, ALEX LEE 10/06/1990

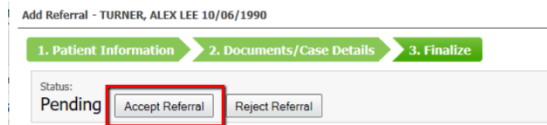
1. Patient Information 2. Documents/Case Details 3. Finalize

Documents Case Details

\*Medical Service

\*Referral Reason

4. Once the required fields are populated, click “Next”
5. Then choose “Accept Referral”



Add Referral - TURNER, ALEX LEE 10/06/1990

1. Patient Information 2. Documents/Case Details 3. Finalize

Status: Pending **Accept Referral** Reject Referral

6. Once the referral is accepted, click “Submit” and the referral will show on your receiving worklist to start working



Next Cancel **Submit**