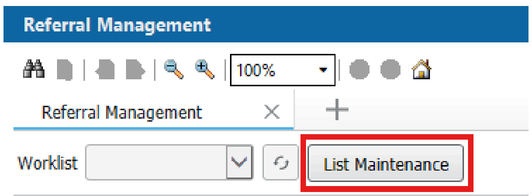
REFERRAL MANAGEMENT
HOSPITAL INFORMATION SYSTEM (HIS)

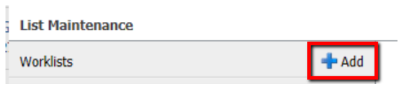
PSYCHIATRISTS

Creating Incoming/Outgoing Referral Lists

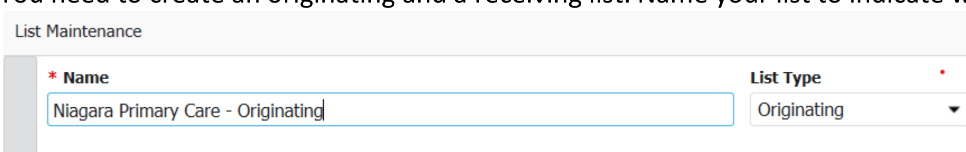
1. Navigate to Referral Management
2. Go to List Maintenance



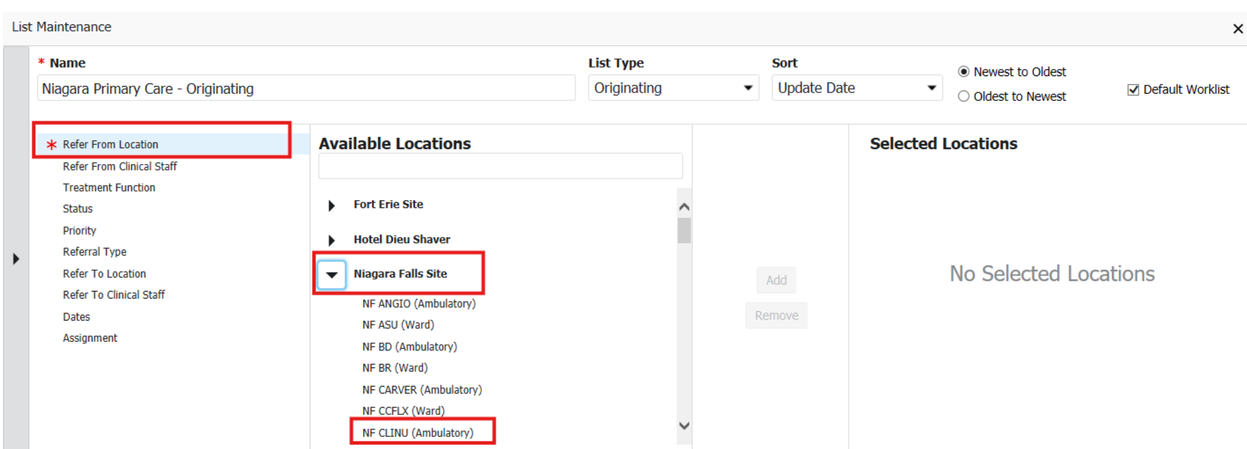
3. Click Add



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



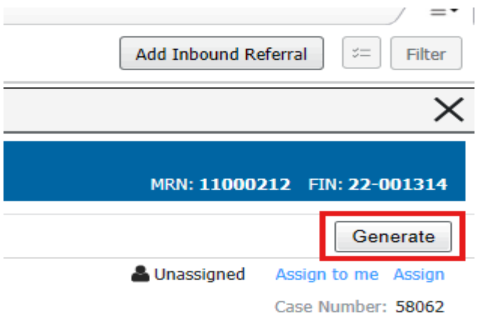
5. After choosing the type of list and naming it, you need to select the locations to associate. Click the locations you want added and click "Add" to move them over to the selected locations box.



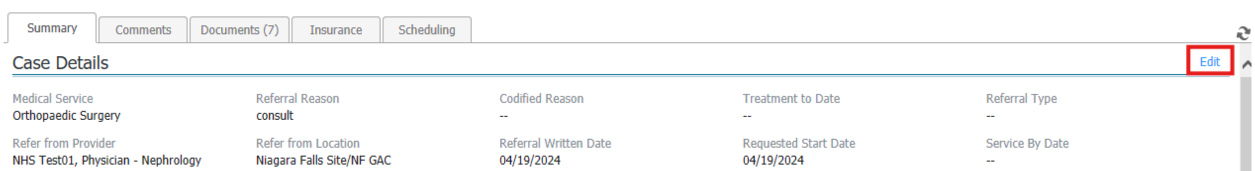
6. You can add additional criteria to the list like specific providers, statuses, etc. by clicking each on each item in the left-hand column and selecting the check box.
7. When you are done creating your list, select Done and close out of list maintenance

Sending an Internal Referral

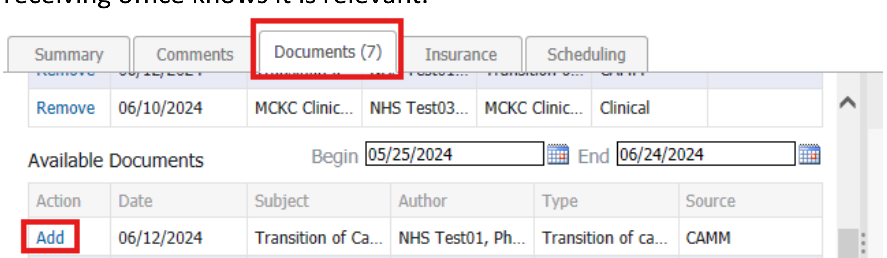
1. Find the patient and click on the row to expand the case details
2. In the upper right-hand corner click “Generate”



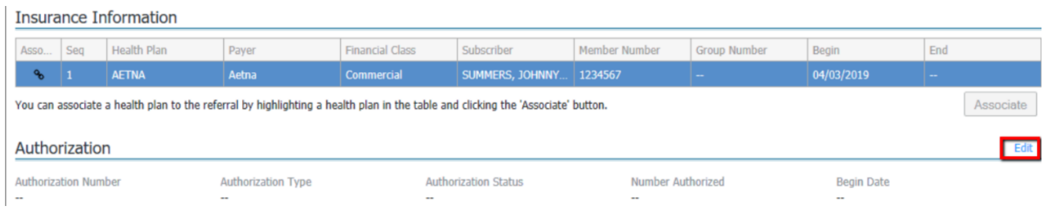
3. If the provider didn’t specify where to send the referral or more information is needed, on the Summary tab click “Edit” and fill in any of the missing information



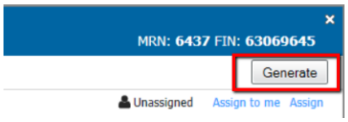
4. If there is a document that needs to be attached to the referral, find the appropriate document on the documents tab and select “Add”. That will attach the document to this case, so the receiving office knows it is relevant.



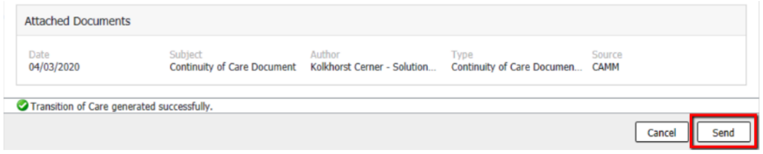
5. If you need to obtain an authorization for the referral, go to the Insurance tab and highlight the patient's health plan and click "Associate". Once the health plan is associated to the case the Edit button above the Authorization section becomes available. Click "Edit".



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



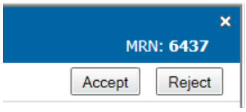
8. Review the case details and click "Send". The case is now in the receiving office's queue



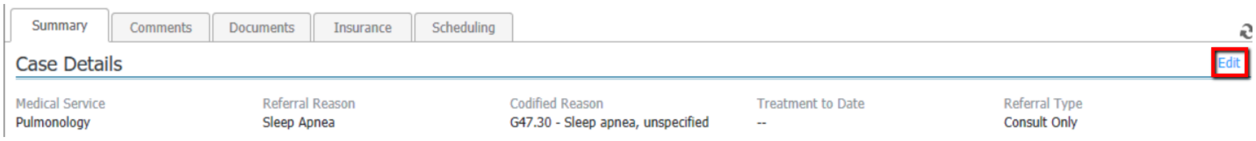
9. The referral will be in a "Pending" status until the receiving office accepts or rejects it

Receiving an Internal Referral

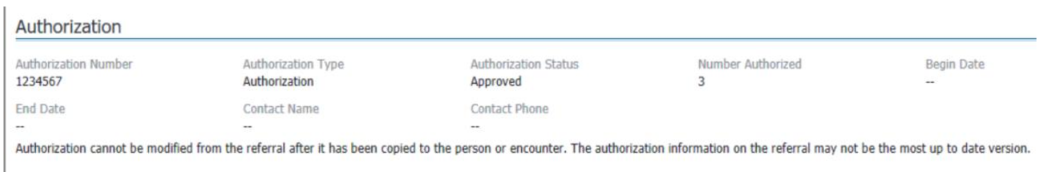
1. Find the patient and click on the row to expand the case details
2. In the upper right-hand corner click either "Accept" or "Reject"
3. If you reject a case, the referring office will see a status of "Rejected" and take the appropriate actions on it
4. If you accept the case, you will start working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



5. 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.



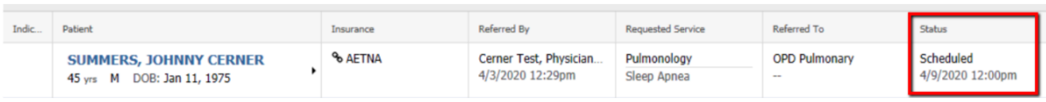
6. Next, review the Comments, Documents and Insurance tabs
7. On the Insurance Tab, you will see a message that says the authorization has been copied to the person or encounter level and cannot be modified. If you need to update the authorization information, you will navigate to the person's registration view and make the update there.



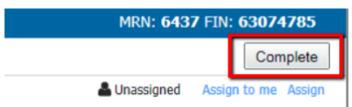
8. Once you have the information you need, navigate to the Schedule Tab and click "New Appointment"

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

12. 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".



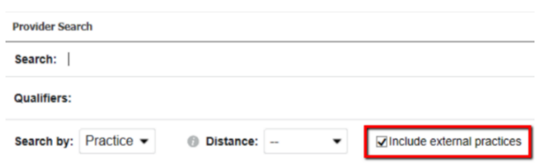
13. When the patient arrives for the appointment and is checked in, the status of the referral will update to "Patient Seen".
14. Attach necessary documentation to the case and update the status of the case to "Complete"



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

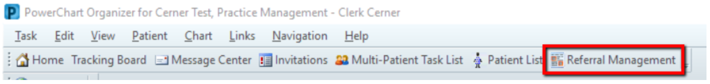
Sending an External Referral

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

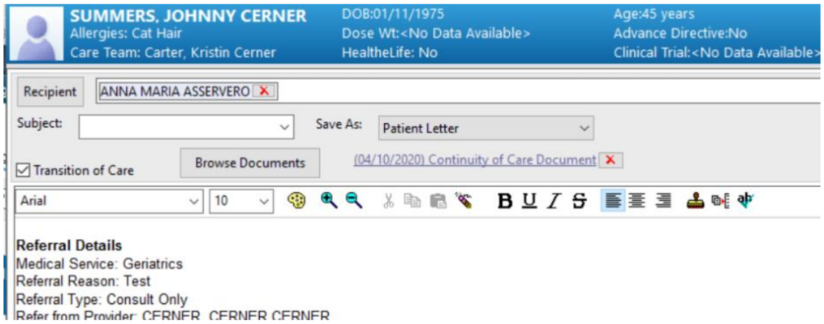


5. Go through each tab and add the appropriate details
6. Once you have the information needed, click "Generate"
7. Since you are sending this referral outside of the organization, you are prompted to go to PowerChart and create a letter

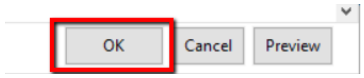
8. Navigate to PowerChart and click “Referral Management”



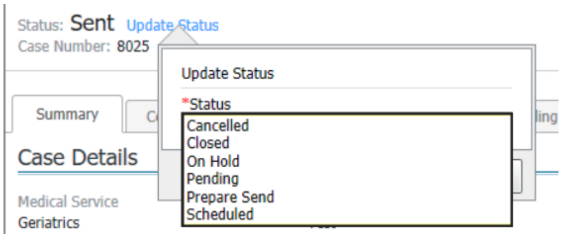
9. Find your patient on your originating list, open the case and click “Generate” again
10. A Provider Letter will automatically pop up with the case information populated and a Continuity of Care Document attached



11. The physician you are referring to will automatically pull into the Recipient field with their contact information. Click “Recipient” to review the information.
12. 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.
13. Once you have the information needed within the letter, click “Ok” to send it



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



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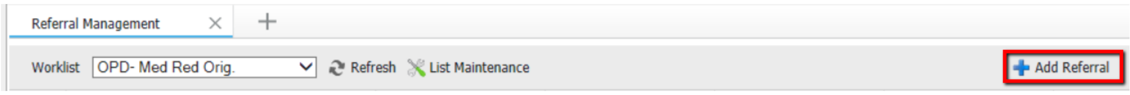
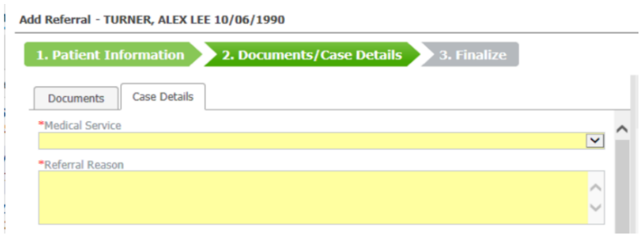
Receiving an External Referral

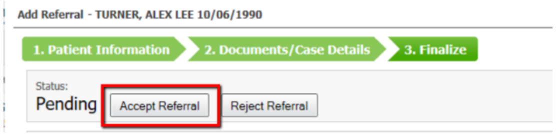
1. If you received an outside referral, click "Add Referral" within Referral Management



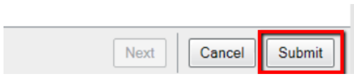
2. Search for your patient in Smart ID using the First Name, Last Name, Date of Birth and Gender. Select the correct one and click "Accept". If you can't find your patient, click "Create New" and go through the process to add a patient and then start with step 1 again.
3. Go to the Case Details tab and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



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



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



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