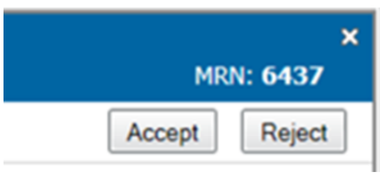
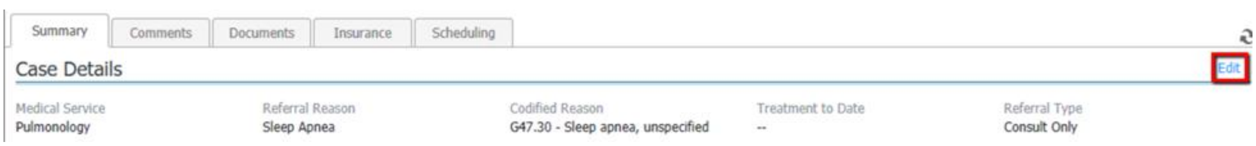
ORGANIZATION: REFERRAL: RECEIVING AN INTERNAL REFERRAL

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.



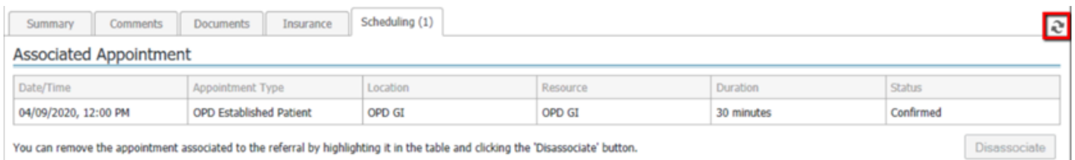
6. Next, review the Comments, Documents and Insurance tabs
7. On the Insurance Tab, you will see a message that says the authorization has been copied to the person or encounter level and cannot be modified. If you need to update the authorization information, you will navigate to the person’s registration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

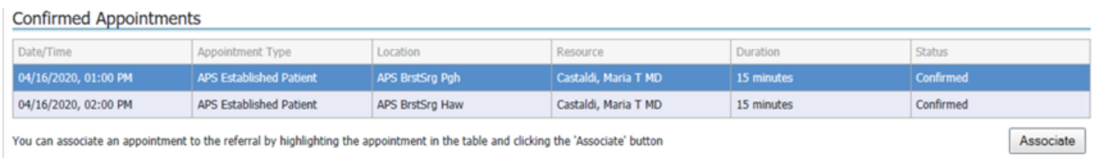
10. Once you have confirmed the appointment, go back to your Referral Management View

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



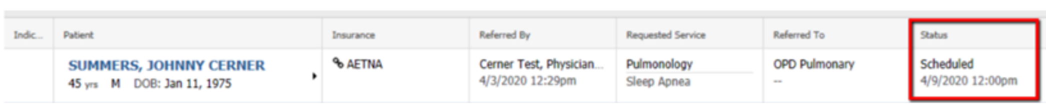
Date/Time	Appointment Type	Location	Resource	Duration	Status
04/09/2020, 12:00 PM	OPD Established Patient	OPD GI	OPD GI	30 minutes	Confirmed

12. 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



Date/Time	Appointment Type	Location	Resource	Duration	Status
04/16/2020, 01:00 PM	APS Established Patient	APS BrstSrg Pgh	Castaldi, Maria T MD	15 minutes	Confirmed
04/16/2020, 02:00 PM	APS Established Patient	APS BrstSrg Haw	Castaldi, Maria T MD	15 minutes	Confirmed

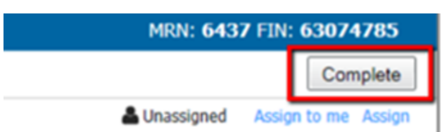
13. After an appointment is attached to the case, the status will show as "Scheduled" with the date and time of the appointment. If the patient no shows or cancels the appointment, the status will update to "Pending Reschedule".



Indic...	Patient	Insurance	Referred By	Requested Service	Referred To	Status
	SUMMERS, JOHNNY CERNER 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

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

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



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