

## Placing a Care Coordination Referral

1.) From the patient's hub select the referral button on the left-hand side:

**Patient Hub TEST, TEST** Nov 12, 1975 (45 yo F) Acc No. 9129

**TEST, TEST 45Y, F** INFO

821 WESTWOOD DR, New York, NY-10018  
 660-221-8084(P) | |  
 mlynch@kathyhealth.org | 11/12/1975  
 Account No: 9129 | Messenger Enabled: Yes  
 Web Enabled: Yes | healow Tracker Data: No |

Advanced Directive :  
 Insurance : **UMR UNITED HEALTH CARE**  
 Last vMsg : 01/28/2021 , 14:07:54  
 PCP : **Campbell, Amber**  
 Rendering Pr :  
 Default Facility :

**Billing**

Patient Balance : **\$310.00**  
 Account Balance : **\$310.00**  
 Collection Status :  
 Assigned to :

**Billing Alert** Guarantor Balance  
 Account Inquiry Billing Logs

**Appointments**

Last Appointment : **01/28/2021 02:30 PM**  
 Facility : **01:Katy Trail Com He**  
 Next Appointment : **02/28/2021 08:45 AM**  
 Facility : **01:Katy Trail Com He**

Bumped App: **NONE** Case Manager Hx:

New Appointment

**Structured Data**

Veteran  
 Seasonal  
 Migrant  
 Homeless  
 Limited English Proficiency  
 Public Housing  
 Reason patient not qualified for sample (ACO)

15 Labs  
 1 DI  
 0 Referrals  
 0 Actions  
 1 Tel Enc  
 0 Web Enc  
 2 Docs  
 0 P2P

Progress Notes Patient Docs Action New Tel Enc  
 Medical Summary Devices Logs New Web Enc  
 Medical Record Consult Notes Letters >> Send Message  
 Problem List Flowsheets Print Labels Messenger  
 eCliniForms >> PHM Hub Dental Exam

2.) Toggle to “outgoing” then select “NEW”:

Patient: TEST, TEST

Incoming **Outgoing**

New Delete

Date	Reason	Referral From	Referral To	Speciality	Start Date	End Date	Allow	Used Visits	Status	Referral Type
<input type="checkbox"/> 01/28/2021	Assistance in Marshall for home health   PTO & OT Evals	TEDROW, JEFFREY		Home Health	01/28/2021	01/28/2022	0	0		Visit Unit
<input type="checkbox"/> 01/19/2021	diabetes	TURNER, IVETTE		Podiatry	01/19/2021	01/19/2022	0	0		Visit Unit

3.) Next, complete the following highlighted information:

- From: Provider/Facility
- Speciality (Select Care Coordination)
- Facility for Care Coordination Services
- Reason \*
- Diagnosis

The screenshot shows the 'New Referral (Outgoing)' form for patient TEST, TEST (DOB: Nov 12, 1975, 45 yo F, Acc No. 9129). The form is divided into several sections:



- From:** Provider: BELT, RENAE; Facility: Katy Trail Com Health S.
- To:** Provider: (empty); Specialty: Care Coordination; Facility: Katy Trail Com Health S.
- Insurance:** UMR UNITED F; Pt Ins; Auth Type: (empty); Auth Code: Authorization Code; Open Cases: (empty); Unit Type: V (VISIT); Assigned To: Lame, Saman; Priority: Routine.
- POS:** 11; Start Date: 02/11/2021; End Date: 02/11/2022; Received Date: (empty); Referral Date: 02/11/2021; Appt Date: (empty); Sub Status: (empty).
- Status:** Open (selected), Consult Pending, Addressed.

Below the form, there are three tabs: 'Diagnosis / Reason', 'Visit Details', and 'Notes'. The 'Notes' tab is highlighted with a purple arrow pointing upwards. Under the 'Reason' section, 'Uninsured patient' is listed. Under the 'Diagnosis' section, 'E08.44 Diabetes mellitus due to underlying condition with diabetic amy...' is listed. At the bottom, there are buttons for 'Scan', 'Attachment (2)', 'Logs', 'OK', 'Cancel', and 'Send Referral'.

4.) Select "Notes" under the where the purple arrow is pointing above to add additional information for the care coordinator. This is will you will state all services you need for your patient. Then select "ok"

The screenshot shows the 'New Referral (Outgoing)' form with the 'Notes' tab selected. The form is identical to the previous screenshot. The 'Notes' tab is highlighted with a blue arrow pointing downwards. Below the form, there are three tabs: 'Diagnosis / Reason', 'Visit Details', and 'Notes'. The 'Notes' tab is highlighted with a blue arrow pointing downwards. Under the 'Notes' section, there is a text area with the following text: 'Lame, Samantha 02/11/2021 02:12:35 PM >Patient is in need of health insurance, recently diagnosed with diabetes and cannot afford medications. Please assist in getting health coverage or vouchers for medication.' Below the text area, there are buttons for 'Add General Notes', 'Add Clinical Notes', 'OK', 'Cancel', and 'Send Referral'. A green arrow points down to the 'OK' button.

5.) After you hit ok, the patient's referral should appear in the referral module. Example below:

Referrals for TEST, TEST  Nov 12, 1975 (45 yo F)  Acc No. 9129

Patient: TEST, TEST

Incoming Outgoing

New Delete ▾

	Date	Reason	Referral From	Referral To	Speciality	Start Date	End Date	Allow	Used Visits	Status	Referral Type
<input type="checkbox"/>	02/11/2021	Uninsured patient	BELT,RENAE		Care Coordination	02/11/2021	02/11/2022	0	0	Open	Visit Unit