

How to Access Outgoing Referral Workflow

Referrals for internal and external services will be entered as **outgoing** referrals

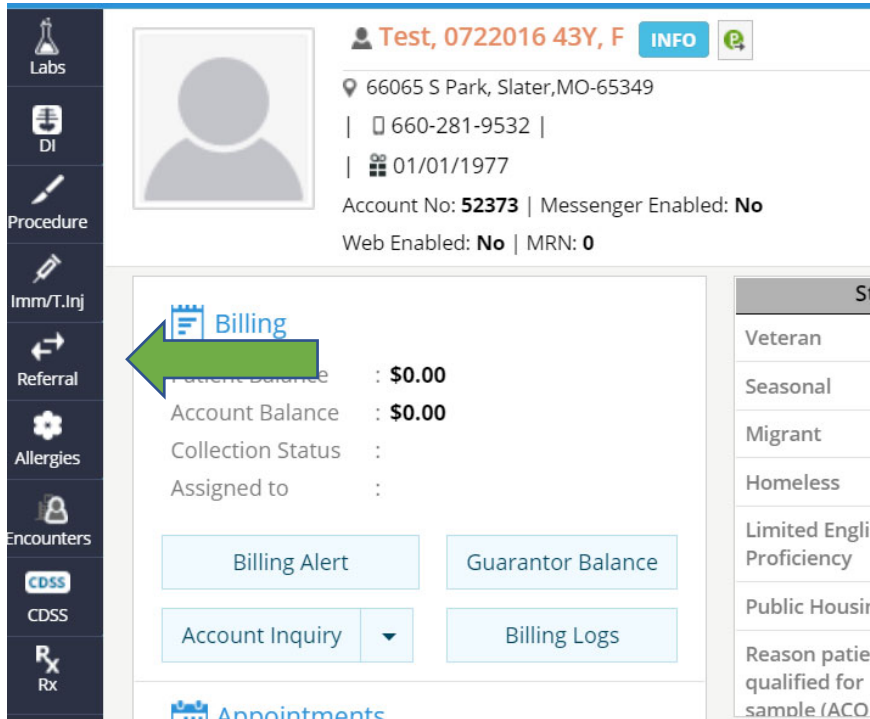
Internal Services will be entered within an outgoing referral. Utilize the below Specialty options:

- | | |
|---|---|
| Dietician Services- Dietician | Behavioral Health (Mental)- Behavioral Health Specialist |
| Psychiatry Services- Psychiatry | Behavioral Health (Chronic Dx)- Chronic Disease Management |
| Dental Services- Dental Care | Medical Services (from dental)- Primary Care |
| IBHS- IBHS | Case Management- Case Management |
| Care Coordination- Care Coordination | Medicaid Initiative/PCHH- Primary Care Health Home (PCHH) |

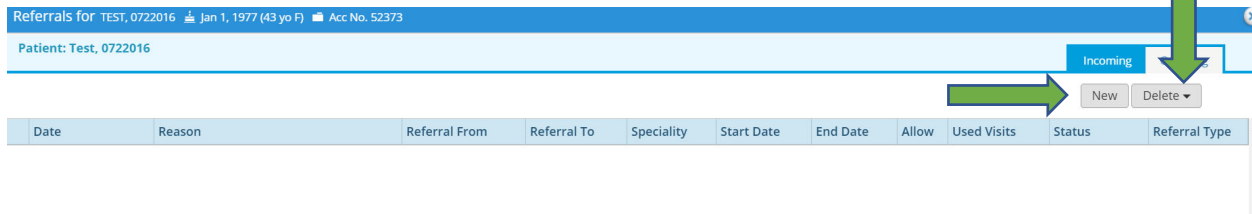
Referrals can be entered through the patient hub, progress note or the R Jelly Bean.

Entering from the patient hub:

- Using the patient look up, within the patient’s hub select referral on the left side panel



Toggle over to outgoing referrals and then select new

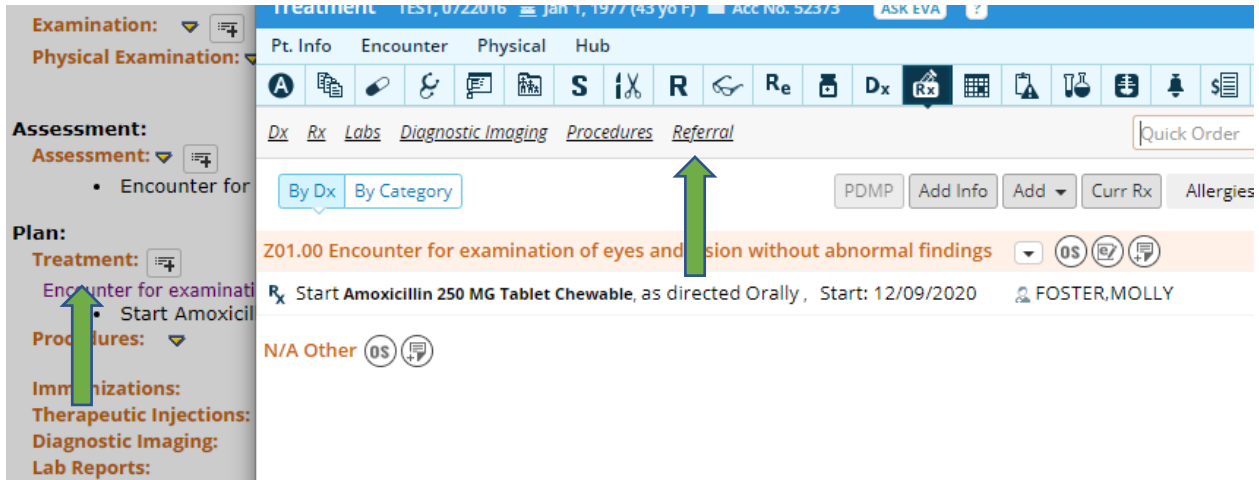


- Follow steps for completing referral below.

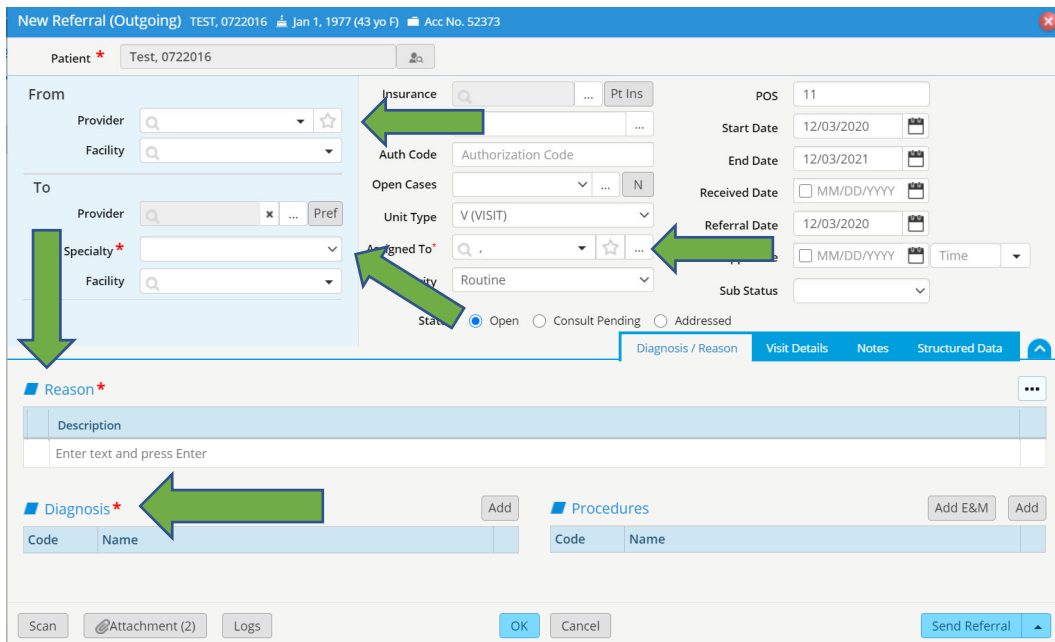
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Entering from the progress note:

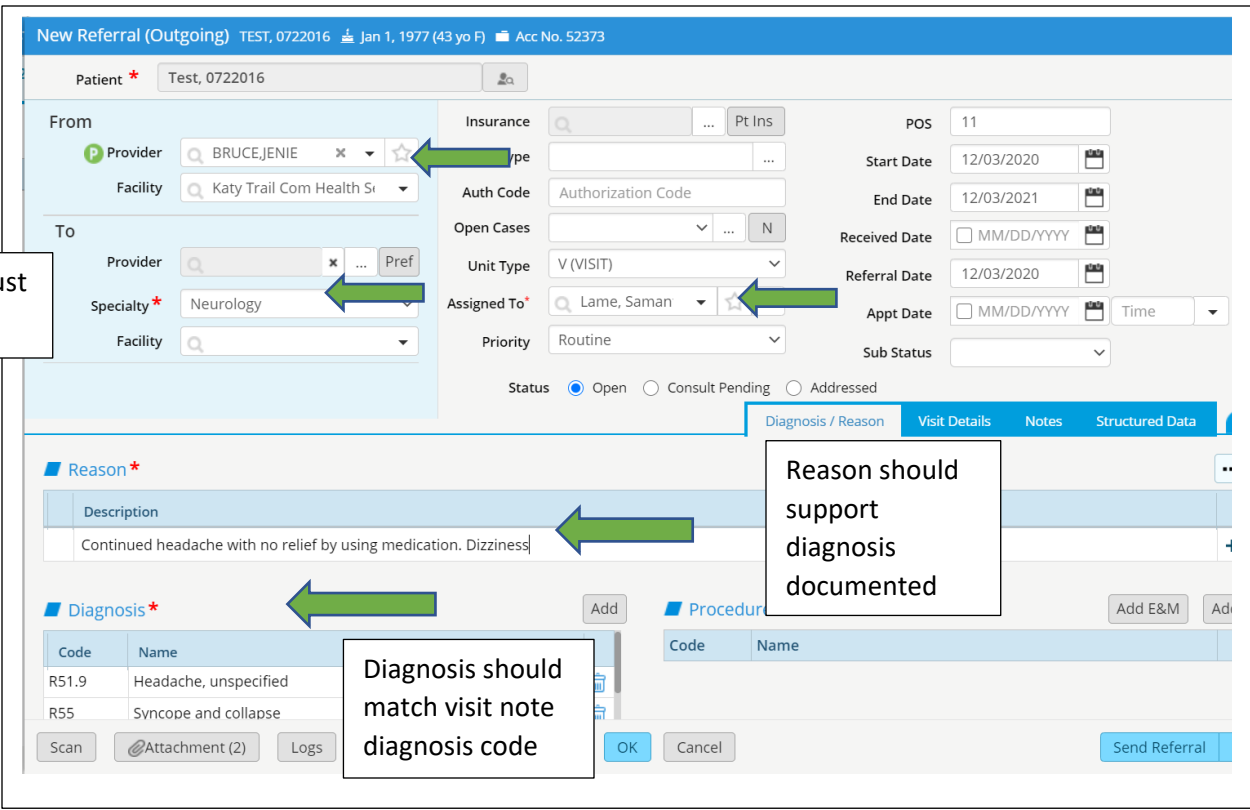
1. Use the treatment window within the progress note to enter the referral
 - a. Select Treatment>Referral



2. The (outgoing) referral window will open. All items with * must be completed
 - a) From Provider- *if referred from progress note, this will auto populate*
 - b) Specialty
 - c) Reason-*this information should support the diagnosis*
 - d) Diagnosis
 - e) Assigned To* *this will auto-populate when you select the (From Provider), if it does not auto populate, search and select Ashley Vajen.*



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Specialty must be selected

Reason should support diagnosis documented

Diagnosis should match visit note diagnosis code

The screenshot shows a 'New Referral (Outgoing)' form for patient 'Test, 0722016'. Key fields include:

- From:** Provider (BRUCE, JENIE), Facility (Katy Trail Com Health Si)
- To:** Provider, Specialty (Neurology), Facility
- Insurance:** Pt Ins
- Auth Code:** Authorization Code
- Unit Type:** V (VISIT)
- Assigned To:** Lame, Saman
- Reason:** Continued headache with no relief by using medication. Dizziness
- Diagnosis:** R51.9 Headache, unspecified; R55 Syncope and collapse

- Note section: please use this section to state where the patient would like to be sent and any other helpful information

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New Referral (Outgoing) TEST, 0722016 Jan 1, 1977 (43 yo F) Acc No. 52373

Patient * Test, 0722016

From

Provider BRUCE,JENIE
 Facility Katy Trail Com Health Si

To

Provider
 Specialty * Neurology
 Facility

Insurance Pt Ins
 Auth Type
 Auth Code Authorization Code
 Open Cases
 Unit Type V (VISIT)
 Assigned To * Lame, Saman
 Priority Routine

POS 11
 Start Date 12/03/2020
 End Date 12/03/2021
 Received Date
 Referral Date 12/03/2020
 Appt Date
 Sub Status

Status Open Consult Pending Addressed

Diagnosis / Reason Visit Details Notes **Structured Data**

Add General Notes

Lame, Samantha 12/03/2020 08:43:27 PM >Perfers MU, please send ER records from BRHC

Add Clinical Notes

Scan Attachment (2) Logs OK Cancel Send Referral

4. Select OK once the referral information is complete

New Referral (Outgoing) TEST, 0722016 Jan 1, 1977 (43 yo F) Acc No. 52373

Patient * Test, 0722016

From

Provider BRUCE,JENIE
 Facility Katy Trail Com Health Si

To

Provider
 Specialty * Neurology
 Facility

Insurance Pt Ins
 Auth Type
 Auth Code Authorization Code
 Open Cases
 Unit Type V (VISIT)
 Assigned To * Lame, Saman
 Priority Routine

POS 11
 Start Date 12/03/2020
 End Date 12/03/2021
 Received Date
 Referral Date 12/03/2020
 Appt Date
 Sub Status

Status Open Consult Pending Addressed

Diagnosis / Reason Visit Details Notes **Structured Data**

Reason *

Description
Continued headache with no relief by using medication. Dizziness

Diagnosis *

Code	Name
R51.9	Headache, unspecified
R55	Syncope and collapse

Procedures

Code	Name
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Scan Attachment (2) Logs **OK** Cancel Send Referral