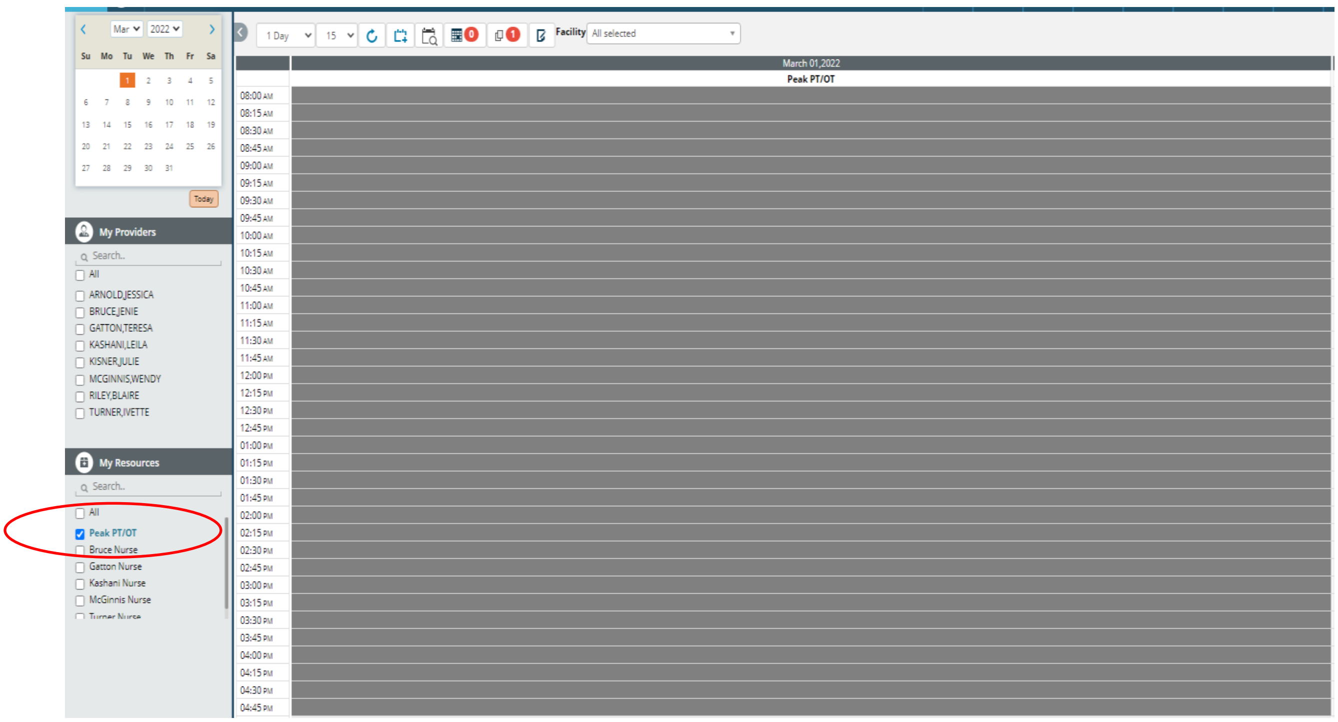
HOW TO Create Referrals
For PT/OT referrals

1. Once the provider has put in the referral, the nurse or Provider will notify Referral Coordinator/contact person at location while the patient is still here.
2. Referral Coordinator/ contact person will contact Bothwell Peak Sport and Spine and request an appointment for evaluation.
3. Open the resource schedule to schedule appointment and click on correct date and time and under the resource schedule named Peak PT/OT.



4. Double click on the slot next to the time of the appointment.

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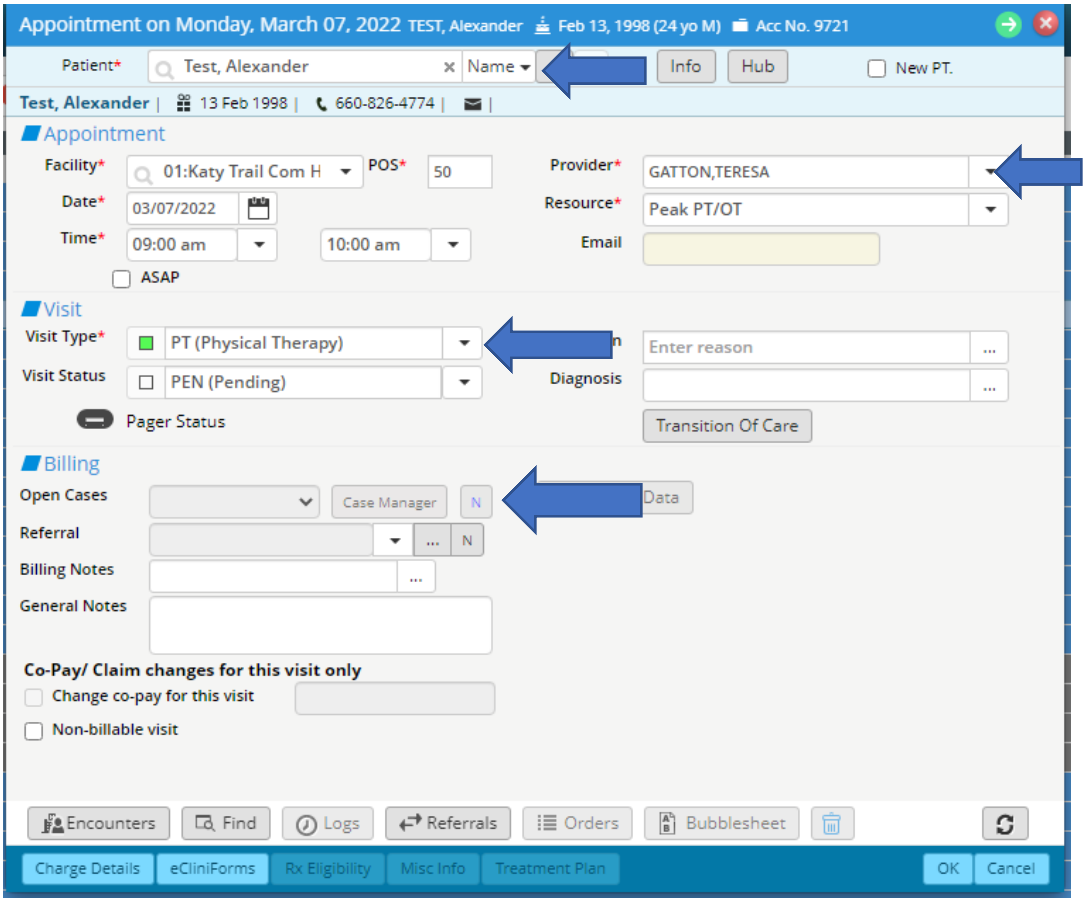
For PT/OT referrals

5. Once the appointment box pops up, enter patient name and who their provider is.
   a. Under visit type choose either PT or OT.
   b. Then click on the N Under billing.



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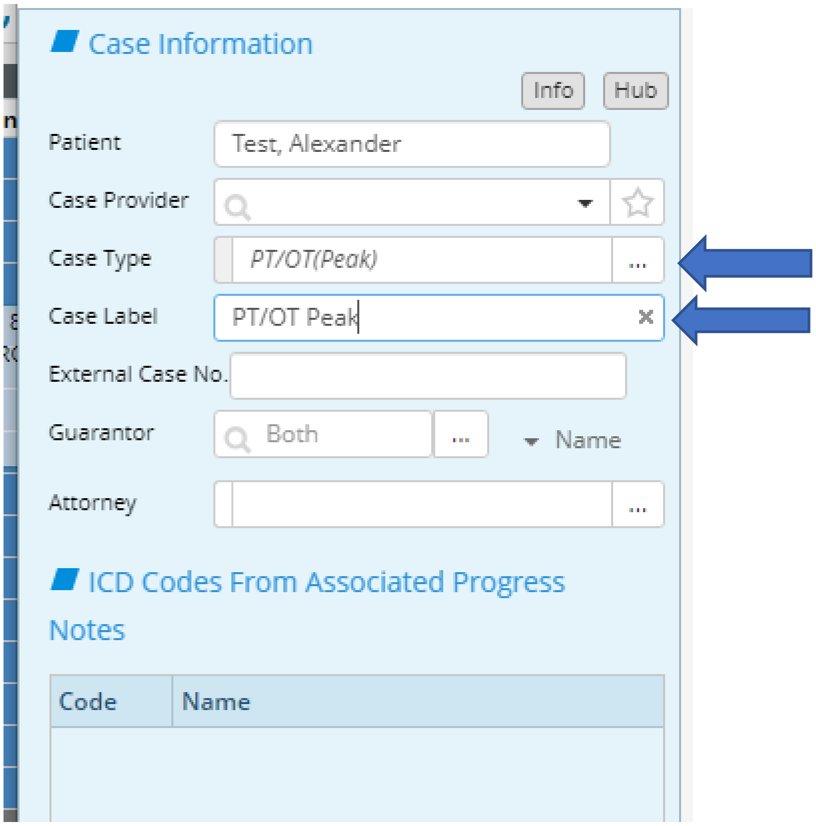
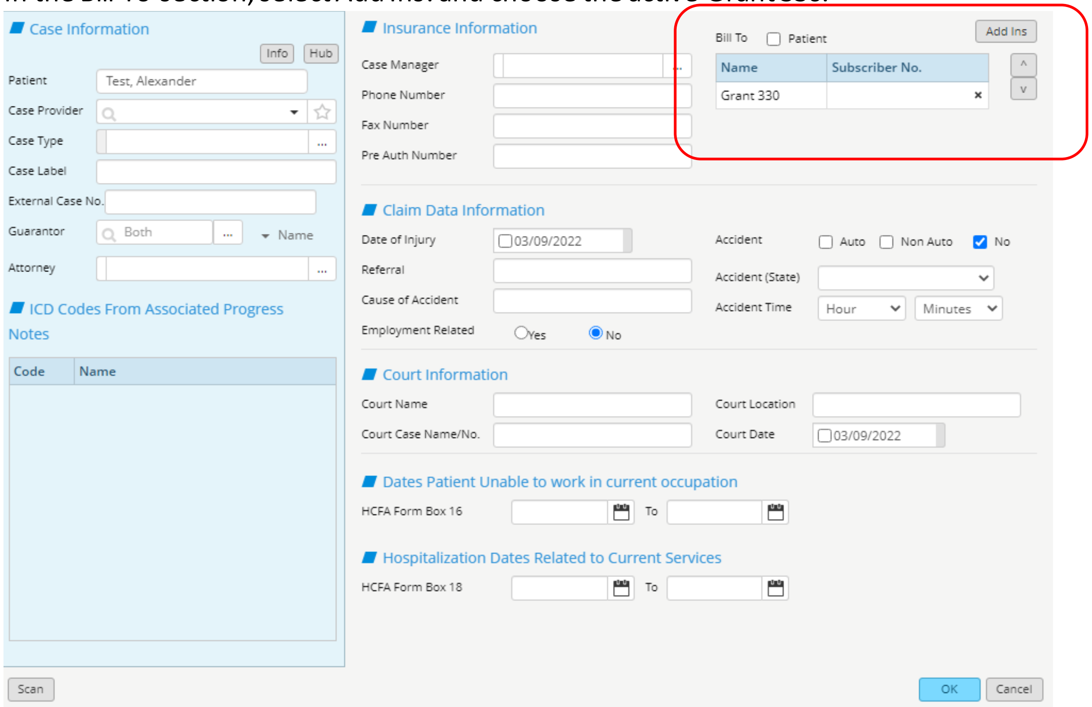
6. On the case details screen choose case type as PT/OT (Peak) and case label you will write in PT/OT Peak.



7. In the Bill To section, select Add Ins. and choose the active Grant 330.



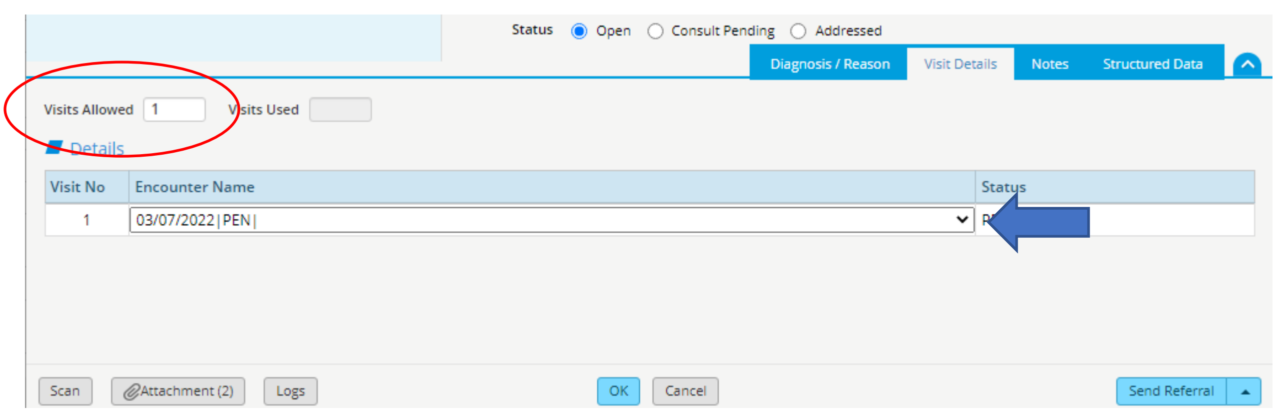
8. Save & Close the case.

9. Save & close the appointment window.

10. Double click to reopen the appointment window & link the case via the dropdown window.

11. You will then go to the bottom and click on referrals.

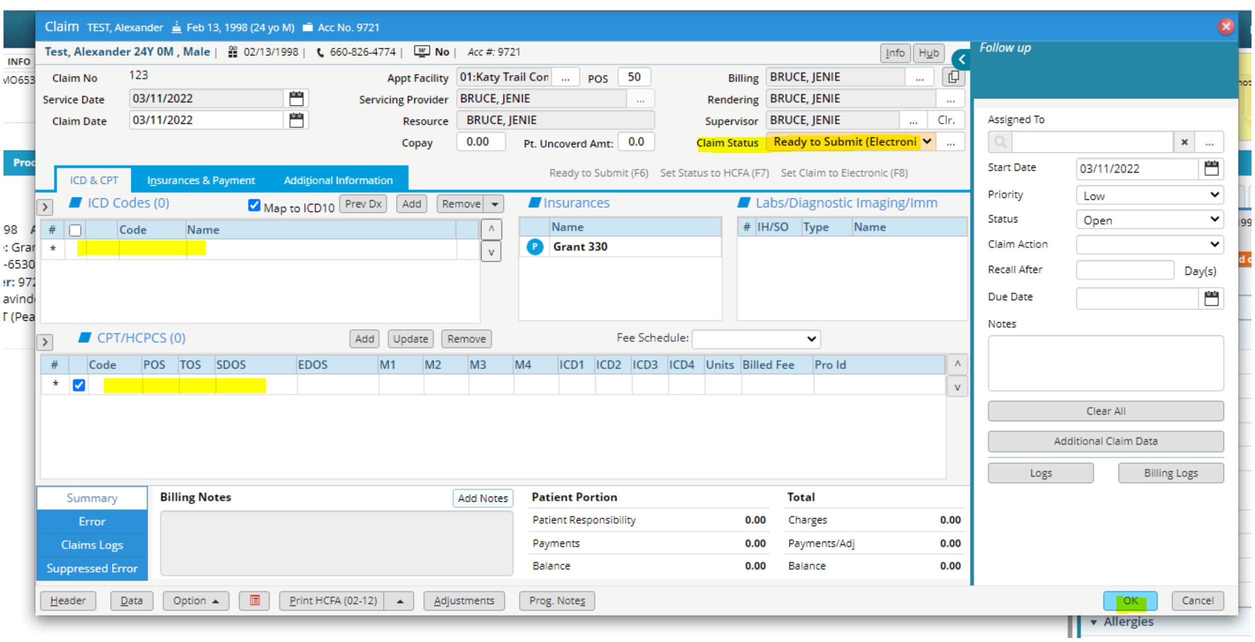
12. When the referrals screen pops up, click on visit details and in the visits allowed, you will add 1. Click on the arrow under Encounter Name and choose the date of the visit and then click OK.



13. If the appt was cancelled within the alotted 2 hr time frame, the appt will be rescheduled in the new appt slot.

POST APPOINTMENT--

14. Once evaluation is done, Peak will email Kari Culley with a list of appointments that have been made for the patient. She will then instruct the referral coordinator to schedule the appointments on the resource schedule and add number of visits to the referral.
15. As we are notified that the appt status, the RC will change the status of the referral to ***CHK*** if the appt was kept or ***N/S*** if the appt was not kept. (Comment: Will we charge pts who fail to cancel/no show within the allotted time?)
16. If appt was kept, after changing the appt status, the RC will right click on the appt and select ***View Progress Note***
17. The RC will select the ***Claim*** option on the bottom of the progress note.
18. On the pop up window, the RC will select **HCFA** and **OK** to create the claim.
19. On the claim, the RC will enter the:
    a. ICD of:
    b. CPT of:
    c. Update the status to: ***Ready to Submit***
    d. Select ***OK*** to save & close



20. The RC will save & close the progress note and continue to the next patient.