

## Referring Physician Documentation for Providers, Clinical Staff, and Clerical Staff

Cerner PowerChart Ambulatory EDUCATION

To ensure the referring physician receives specialty clinic documentation, there are steps to be completed by the clerical staff scheduling the appointment and the provider completing the note.

## **Clerical Staff**

When scheduling a patient who has been referred to the clinic, the Referring Physician **must** be entered into the appointment details in Revenue Cycle.

- In the Add Appointment Plus details section of the Appointments perspective in Revenue Cycle, enter the referring provider name in the Referring Physician field and click the magnifying glass to search.
- Select the appropriate provider.
- 3. Click Select.

	🔍 Preview	-				
	Name	Aliases				
	Test , EMR Sunquest	ORGANIZATION				
Γ	Test MD, Physician	ORGANIZATIC	au Memorial Health Center, Paul Olive			
1	Test, Protected	<u> </u>	au Memorial Health Center, Paul Olive			
	Testerman RT(R), Shannon M	COMMUNITY Dr	nu Memorial Health Center, Paul Oliv			
	testgoepfrich, chris					
	<					
		The second se	3			
		1	Select Cancel			

📁 *Add Appointment Plus 🛛 🗡			8
FP Established Patient • Locations ~ Munson Family Practice Center	Details   Select the billing option.  Insurance Profile  Do you want a reminder for this appointment?  Yes - SMS Text  FP Established Patient	Patient Language English FP Established Patient	~
	* Reason For Visit Test PP Established Pasient	Referring Physician Test 1	٩

Note: To validate the Referring Physician information entered, navigate to the Patient Information section of the PowerChart dark blue Menu, and click the Relationship Summary tab.

## Providers

When the provider completes the note (Office Note, Office Procedure Note, or Consultation Note), the provider will click Sign/Submit to open the Sign/Submit Note window.

To ensure the Referring Physician receives documentation via distribution, the provider **must**:

- 1. Click on the Relationships tab.
- Click on the blue plus sign to the right of the Referring Physician name in the Contacts column. This will add the Referring Physician to the Recipients window and automatically select Review/CC.
- 3. Click **Sign** to send the document.

Туре:	Note Typ	pe List Fi	Iter:				
Neurology Office Note 🗸		All 🗸					
Author:	Title:				*Date:		
dson RN, Kelli	Neurology Office Note				6/12/2023 🛄 1233 E		
Contacts	Recipien	ts		_		_	
Contacts	Recipient	ts	10	6		6°	Deview 10
	×	Default		Comme	ent	sign	Review/C
J This Visit	<b>*</b>	~	Primary Care Physician (Lifetime)			0	۲
J Lifetime							
Hartman RN, Mary J Other (Lifetime) - System Ad							
PHYSICIAN, NO Primary Care Physician (Lifeti							
Vaughan Tonya I							