

# Referral Management FAQ

Cerner PowerChart Ambulatory EDUCATION

## Referral Management FAQ

### General Questions:

#### Who do I contact for support?

*Answer: A Teams meeting chat will be available for support/questions during the week of go-live. Email [MHC-ClinicalInformatics@mhc.net](mailto:MHC-ClinicalInformatics@mhc.net) with specific questions. Thereafter, call the Ambulatory Informatics helpline at 231-392-0229.*

#### Who do I contact if there is incorrect information in the provider/location referral search?

*Answer: Call the Ambulatory Informatics helpline at 231-392-0229.*

### Referral Process, Setup, or Workflow Questions:

#### Do I need to continue working referrals from myViews.?

*Answer: Yes, until all referrals on the myViews referral list have been completed, both myViews and Referral Management lists need managed.*

#### I don't see any patients or referrals in Referral Management.

*Answer:*

*Your Referral Management Worklist needs set up. See Referral Management Settings and Preferences on the [Clinical EHR Education](#) website for further instructions.*

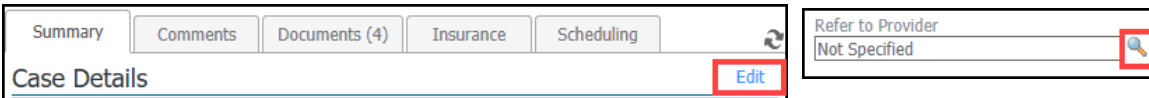
#### How do I locate a provider or location for the referral order?

*Answer: Use the provider search tool next to the Refer to: field. For further instructions reference the document Ambulatory Referral Order here: [Ambulatory Clinical Orders / Munson Healthcare](#).*



#### The Provider or location is not entered on the order?

*Answer: Click Edit on the Referral Case Details and search for the provider and/or location using the provider search tool found next to the Refer to: field. For further instructions refer to [Ambulatory Clerical Referrals / Munson Healthcare](#).*



#### A Provider or location not found on the provider search?

*Answer: Search for "Other External" Practice. For further instructions refer to [Ambulatory Clerical Referrals / Munson Healthcare](#).*

#### How do I set up my worklists? What worklists do I create?

*Answer: Reference the Referral Management Settings and Preferences on the [Clinical EHR Education](#) website for further instructions.*

#### Where do I enter referral authorization information?

*Answer: From referral management within Case Details. Navigate to the Insurance tab and click Edit next to authorization.*

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**If two referral orders are placed on an InBetween Visit, and each one needs to be linked to a different insurance, can you associate each referral to a different insurance?**

*Answer: Yes. Both insurances will show within the Referral Case Details. Associate the correct one for that referral.*

**What to do if a staff member picks an incorrect provider for the referral?**

*Answer: Edit the Refer to provider's name in the referral Case Details.*

**Will Referral Management provide any alert or notification on a failed provider letter fax?**

*Answer: Referral Management does not show a success or failure transmission. Follow your current process of monitoring provider letter faxes.*

**Is there a transition of care checkbox that needs to be checked for MACRA/MIPS?**

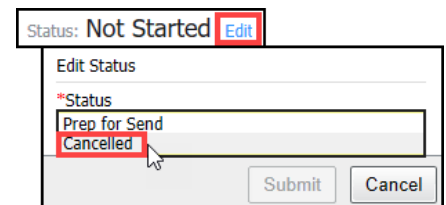
*Answer: No, transition of care will automatically generate within the referral generation process.*

**Why are there two orders showing for the same order?**

*Answer: Both the Ambulatory Referral to Diabetes Education and the Ambulatory Referral to Oncology for Lung Cancer Screening orders will generate two orders that appear on the Orders Screen. This allows for all needed information to show on the outgoing referral.*

**What if a referral needs to be cancelled?**

*Answer: Within Referral Management, open the Referral Case Details. Edit the status. Select Cancelled and select a reason. Contact the referring location if coming from an external practice, or the referred to location if the referral has already been sent.*



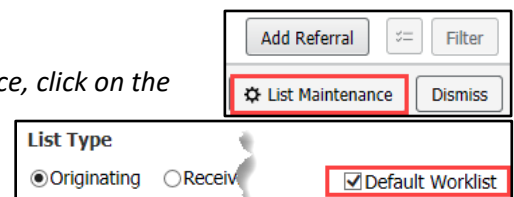
### Tips & Tricks:

#### Refreshing & default worklists:

*When refreshing PowerChart or Revenue Cycle, the worklist displayed on the Referral Management mPage will revert to your default list at every refresh.*

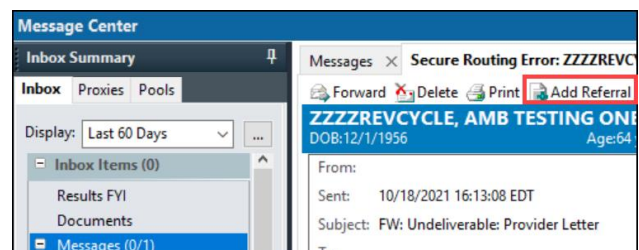
*To update the selected default worklist: Select List Maintenance, click on the desired worklist, select the Default Worklist checkbox.*

- You can only have one default worklist selected.



#### Referrals coming into message center:

*Referrals coming into message center can be manually added to the Receiving Referral Management Worklist. Open the message and click Add Referral.*

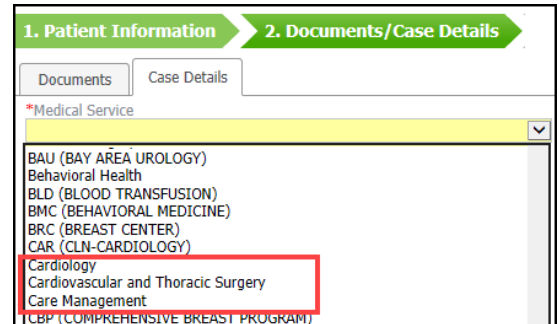


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**Choosing the correct Medical Service on AdHoc Add Referral:**

*Select the correct service from the lowercase options. These are the ambulatory locations. **Do not select all CAPS medical service.***



The screenshot shows the '2. Documents/Case Details' tab in Cerner PowerChart. Under the '\*Medical Service' dropdown, the following options are listed: BAU (BAY AREA UROLOGY), Behavioral Health, BLD (BLOOD TRANSFUSION), BMC (BEHAVIORAL MEDICINE), BRC (BREAST CENTER), CAR (CLN-CARDIOLOGY), Cardiology, Cardiovascular and Thoracic Surgery, Care Management, and TCBP (COMPREHENSIVE BREAST PROGRAM). A red box highlights the 'Cardiology' and 'Cardiovascular and Thoracic Surgery' options.

**What is the proposed workflow for managing referrals?**

*Refer to the document [Referral Management-Flow of Referrals Through the Worklist here Ambulatory Clerical Referrals | Munson Healthcare.](#)*