MUNSON HEALTHCARE

Cerner Revenue Cycle and PowerChart Ambulatory **EDUCATION**

Referral Management Pocket Reference

Audience: Referral Coordinators

Updated: February 27, 2023 (JAS)

Worklist Creation

1	Access Referral Management from either PowerChart or RevCycle.
2	Click on **List Maintenance**.
3	Click **+Add**.
4	Enter the name of the worklist using the naming conventions in the Referral Management Settings and Preferences document.
5	Choose the correct List Type: Originating or Receiving.
6	Select the Refer From/Refer To Location.
7	Select Status(es).
8	Click **Save**.

Clinical EHR Education Website Reference: Referral Management Settings and Preferences

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Worklist Contents by Status

1	Originating: To Send – contains Not Started and Prep for Send statuses • Newly created referrals that need to be started or need additional information gathered before sending.
2	Originating: Monitoring – contains Sent and Scheduled statuses • Sent referrals that have been scheduled by the receiving practice. Monitor to make sure that referrals are being scheduled timely.
3	Originating: Review – contains Rejected and Cancelled statuses • If referral is not appropriate or patient has not responded, receiving facilities may reject or cancel referrals. Triage referrals as needed.
4	Originating: Complete – contains Complete and Closed statuses • Patient has been seen and documentation sent back to originating facility. Review documentation, then close referral.
1	Receiving: Pending Acceptance – contains Pending Acceptance statuses • Newly received referrals awaiting review and acceptance.
2	Receiving: Accepted – contains Accepted statuses • Referrals awaiting scheduling.
3	Receiving: Reschedule – contains Pending Reschedule statuses • Patient cancels or no shows original appointment. Patient needs to be contacted for rescheduling.
4	Receiving: On Hold – contains On Hold statuses • Referrals awaiting additional information or return call from patient.
5	Receiving: Referral Completion – contains Patient Seen statuses • Patient has been seen in clinic and documentation is complete. Documentation needs to be sent back to the referring facility and status updated to Completed.

Clinical EHR Education Website Reference: Referral Management – Flow of Referrals Through the Worklist

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Worklist Modification

1	Access Referral Management from either PowerChart or RevCycle.
2	Click on **List Maintenance**.
3	Click on the worklist to be modified.
4	Edit as needed.
5	Click **Save**.

Clinical EHR Education Website Reference: Referral Management Settings and Preferences

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Sending Outbound Referrals

1	Access Referral Management from either PowerChart or RevCycle.
2	Select the worklist **Originating: To Send**.
3	Click in the box next to the patient's name to open the referral.
4	Click **Assign to me**.
5	Click **Start Referral**.
6	Review the Summary tab.
7	Add the Refer to Provider or Refer to Location if needed. a. Click **Edit** on the Summary tab. b. Click the magnifying glass next to Refer to Provider. c. Search for and select the appropriate provider or practice from the list. d. Click **Accept**.
8	Review the Comments tab and add comments as needed.
9	Review the Documents tab and attach any necessary documents. a. Click on the document to preview it. b. Click **Add** to attach an available document to the referral. c. Click **Remove** to remove an attached document.
10	Review the Insurance tab. a. Select the correct Health Plan to associate to the referral. b. Click **Associate**.
11	Click Edit to add Authorization information if needed.
12	Click **Generate**.
13	Review the Referral Summary Case Details.
14	Click **Send**. If referral is going to an internal practice, the process is complete.
15	If the referral is going to an external practice: a. Add additional information as needed. b. Click **Preview** to view the letter and attached documents. c. Click **OK** to send.

Clinical EHR Education Website Reference: Managing Referrals

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Referral Management Pocket Reference
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Receiving an Inbound Referral through Referral Management

1	Access Referral Management from RevCycle.
2	Select the worklist **Receiving: Pending Acceptance**.
3	Click in the box next to the patient's name to open the referral.
4	Review each tab of the referral details to determine whether the referral is appropriate for the clinic.
5	If appropriate, click **Accept** and continue to step 6. If not appropriate, click **Reject** and enter a comment. Stop here as nothing further is needed for this referral.
6	Click **Assign to me**.
7	Click **Start Referral**.
8	Go to the Scheduling tab.
9	Click **New Appointment**.
10	Proceed with scheduling process.

Clinical EHR Education Website Reference: Managing Referrals

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Receiving an Inbound Referral through Other Means

1	Referrals may be received in other ways than through Referral Management (i.e., Message Center, Direct Trust, Fax, Work Queue Monitor, etc.).
2	Review document(s) and then scan or import into the patient's chart.
3	Access Referral Management from RevCycle.
4	Click **Add Referral**.
5	Search for and select the correct patient.
6	Click **Add** next to any associated documents to attach them to the referral.
7	Click on the document to preview it.
8	Click on the Case Details tab.
9	Enter all incoming referral information.
10	Click **Next**.
11	Review the Case Details and click **Accept Referral**.
12	Click **Submit**.
13	Select the worklist **Receiving: Accepted**.
14	Click in the box next to the patient's name to open the referral.
15	Click **Assign to me**.
16	Click **Start Referral**.
17	Go to the Scheduling tab.
18	Click **New Appointment**.
19	Proceed with scheduling process.

Clinical EHR Education Website Reference: Managing Referrals

Cancelling a Referral

1	If a patient does not respond after repeated attempts to contact for scheduling or opts not to schedule for any reason, navigate to the appropriate Receiving worklist (either Accepted or On Hold).
2	Click **Filter** to search for the patient or use the Patient-Centric Referrals tab.
3	Click in the box next to the patient's name to open the referral.
4	If in the **Accepted** status: a. Click **Edit** next to the Accepted Status. b. Select **Cancelled**. c. Select a **Reason**. d. Enter comments as needed. e. Click **Submit**.
5	If in the **On Hold** status: a. Click **Edit** next to the On Hold Status. b. Select **Pending Acceptance**. c. Click **Edit** next to the Pending Acceptance Status. d. Select **Cancelled**. e. Select a **Reason**. f. Enter comments as needed. g. Click **Submit**.
6	If referral was sent to an external practice, notify practice of cancellation.

Clinical EHR Education Website Reference: N/A

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Completing Inbound Referrals

1	Once visit documentation has been completed by the provider, navigate to the **Receiving: Referral Completion** worklist.
2	Click **Filter** to search for the patient.
3	Click in the box next to the patient's name to open the referral.
4	Navigate to the Documents tab.
5	Click **Add** under Available Documents to attach the correct visit documentation to the referral. a. For manually added referrals, visit documentation must be sent back to the appropriate referring office.
6	Click **Complete**.

Clinical EHR Education Website Reference: [Managing Referrals]

Closing a Completed Referral

1	The Receiving facility will complete the referral (see Completing Inbound Referrals). The Originating facility will close the referral. • If the referral was sent to an external facility, go to the Monitoring worklist, and mark the referral as Completed.
2	Navigate to the **Originating: Complete** worklist.
3	Click **Filter** to search for the patient.
4	Click in the box next to the patient's name to open the referral.
5	Navigate to the Documents tab.
6	Verify the appropriate visit documentation has been attached to the referral.
7	Click **Close**.

Clinical EHR Education Website Reference: Managing Referrals