

Cerner PowerChart Ambulatory EDUCATION

or the Referrals Icon

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Summary: Referral Management provides a streamlined means to transfer and monitor inbound and outbound referrals. Referral Management also offers integration with Revenue Cycle scheduling for a seamless workflow to manage inbound referrals. This document provides instructions on managing inbound and outbound referrals and completing referrals.

Support: Ambulatory Informatics at 231-392-0229.

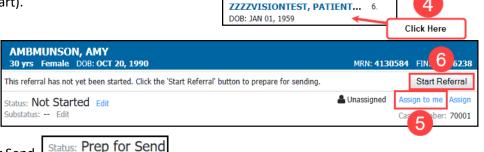
Sending Outbound Referrals

Once an Ambulatory Referral is ordered, the referral must be generated and sent to the referred to provider or facility by following the below steps.

- 1. Click Referral Management on the top toolbar in PowerChart in Revenue Cycle.
 - a. The first-time using Referral Management, preferences and lists will need to be set up. Please refer to the Referral Management Settings and Preferences document on the Clinical EHR Education website.

Worklist | Originating: To Send 💊

- 2. Select the Worklist Originating: To Send.
- The Status Not Started will indicate the Referral has not been started.
- 4. Click in the box next to the patient's name. (Clicking directly on the patient's name will open their chart).
- 5. Click Assign to me.
 - a. This will indicate who is working the referral. It will not remove any referrals from the list.

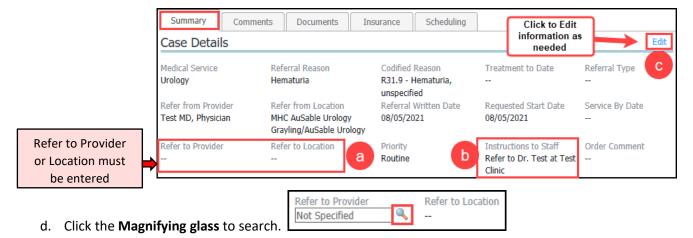


🌃 Referral Management

Status Not Started

Patient

- 6. Click Start Referral.
- 7. The Status will change to Prep for Send.
- 8. Review Summary tab.
 - a. Ensure the Refer to Provider or Location is entered. This **must be** entered to Generate a referral.
 - b. If refer to information is entered in Instructions to Staff, it must be added to the Refer to Provider field.
 - c. To add the Refer to Provider/Location: click Edit.





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- Using the Refer to Provider Lookup:
 - a. Select **Search by** Provider or Practice.
 - b. The list of Providers or Practices that displays is based on the Medical Service selected on the order.
 - c. Select Include external practices if needed.
 - d. Type the Provider or Practice name in the Search field if needed and click Search.
 - e. Highlight the correct Provider or Practice and click **Accept**.
 - f. Click the + for additional Search Qualifiers. (Clear selected Qualifiers by clicking the X next to the selected Qualifier).

P Referral Provider Lookup		
Search: Bay Area d		U
Qualifiers: Pediatric Urology, Urological Surgery, Urological Surg	gy 🗙	+
Search by: Practice a Distance:	✓ Include extern	al practices Search Clear
AuSable Urology 809 E Michigan Avenue, Grayling, MI 497381417 Distance:	С	Urology Within Health System 3 Providers Available
Bay Area Urology 3922 Cedar Run Road, Traverse City, MI 496849687 Distance:		Urology Within Health System 10 Providers Available
Allers NP, Stephanie N	Click here to expand the Practice to show a	Urology
Gillett MD, Ward R	list of providers to choose from	Urology
		e Accept Cancel

- If the Refer to Provider is not available in the Provider Search, search for Other External.
 - a. Click on **Clear** to clear any existing qualifiers.

Provider Searc	ch	
Search:		
Qualifiers:	Pediatric Urology, Urological Surgery, Urology X	a
Search by:	Practice	Search Clear
Provider Search		
Search: Oth	ner C	
Qualifiers:		d +
Search by:	Practice 💌 👔 Distance: 💌	Search Clear
Include ext	ernal practices b	
Other Externa		nal to Health System
		Accept Cancel

- b. Check the box to **Include external practices**.
- c. Type **Other** in the Search field.
- d. Click Search.
- e. Highlight Other External.
- f. Click Accept.



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- 9. Comments tab:
 - a. Enter any comments related to the referral and click **Save**.
- 10. Documents:
 - a. Click **Add** under Available Documents to attach Documents to the outbound Referral.
 - b. Change the date filter for Available Documents if needed.

Summary	Comments	Documents	Insurance	Scheduling	e
					□ Only show my comments
Type Commer	nts here.				<u>^</u>
Limit 500 cha	racters				Cancel Save

	Summary	Comments (1) Document	ts (1) Insurance	Scheduling		
	Attached	Documents					
	Action	Date	Subject	Author	Туре	Source	
	Remove	06/23/2021	Testing	Earl, Stacey M	Consultation No	ote Clinical	
ick to Add	Available	Documents		Begin 05/25/2021	End 0	6/24/2021	
Attached ocuments	Action	Date	Subject	Author	Туре	Source	K
	Add	06/23/2021	Admission He	alth Earl, Stacey M	Admission Heal	lth Clinical	Chang
	Add	06/22/2021	Letter - Norm	al R Earl, Stacey M	Patient Letter	Clinical	Date Ra if need

11. Insurance:

- a. Select the correct Health Plan to associate to the Referral.
- b. Click Associate.
 - a. Only one Insurance may be associated to a referral case, but if the patient has multiple insurances listed, they will be viewable on the referral information being sent.

Send

Recipient

c. Once the Insurance is Associated, click Edit to add or update Authorization Information if needed.

Summ	iary	Comments (1)	Document	s (1)	Insurance	e	Sc	heduling							ĥ
Insura	ance I	nformation													
Asso	Seq	Health Plan		Payer		_		Financial Cla	ass	Subs	criber	Begin	End		
	1	Medicare Part	A and B C	Medica	ire	а		MEDICARE		ZZZZ	VISIONTEST	, 12/06/			
You can	associate	e a health plan to	the referral b	oy highli	ghting a hea	alth pl	lan ir	n the table a	and clicking	g the 'Assoc	iate' button.		b	Associa	ate
Autho	rizatio	on									Click to	Add or U	pdate		dit
Authoriza	ation Nur	mber		Autho	rization Typ	е				Authorizati	Aut	orization prmation	n n		с

- 12. Click **Generate** when ready to send the Referral.
- 13. Review the Referral Summary Case Details and click **Send**.
- 14. If sending the referral to an **internal practice**, the referral will show up on the receiving practice's Referral Management Worklist and the Status will show as Pending Acceptance.
 - a. Once the Receiving practice accepts the Referral, the Status will change to Accepted.

Status
Accepted

- 15. If sending the referral to an **external location**, a Provider Letter will generate.
- 16. If sending a referral using the **Other External** option, for a provider that is not available in the Provider Search, the Recipient details must be manually entered.
 - a. Click on **Recipient** to open the Provider Letter Recipient window.



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- b. The Recipient details can be edited as appropriate by clicking in each field (First Name, Last Name, etc.).
- c. The preferred **Mode** of communication can be selected from a drop-down list.
 - If Mail is selected, click in the required yellow Details field to add the mailing address.
 - If **Fax** is selected, click in the required yellow **Details** field to enter the 10-digit number with no dashes or spaces.
 - If Email is selected, click in the required yellow Details field to enter the email address.
- d. Click OK.

Recipient	b				С		
Favori Primary Prefix	First Name	Last Name	Credentials	Mode	Details	Nore	Delete
<u></u>		Dr. Test		Mail 😽			X
				Fax	j		

- 17. The Provider Letter will show the added recipient details in the Recipient field.
 - a. Review the letter and attached documents.
 - b. Click **Browse Documents** to attach additional Documents.
 - c. Click **OK** to send the letter.

Create Letter					-		\times
Recipient Test MD	X						
Subject: Provider Letter	✓ Save As:	Provider Letter	~				
Transition of Care Bro	owse Documents	documents attached	<u>(06/28/2021) Con</u> (7/8/2021) Contin				a
~	12	X 🖻 💼 🕱	B ⊻ / S	E E 3	📥 🛯 🖣	þ	
Referral Details Medical Service: General Referral Reason: Hip pain Codified Reason: M25.55 Refer from Provider: Test Referral Written Date: 06/ Referral Written Date: 06/ Priority: Routine Insurance Health Plan: Medicare Par	9 - Pain in unspecific MD, Physician Munson Family Pra 24/2021 /24/2021		erse City/Muns	son Family I	Practice	Center	r
Results				_	🙀 Add	Results	
Result Name	Current Result	Date 💽	Previous Result			nce Rang	
				ОК	Cancel	Previe	ew

18. The Referral Status will update to Sent.



Note: If the letter is cancelled, the status will still show Sent. Click Edit and select Prep for Send to indicate the referral was not sent.

Tip: Filter a worklist or search for a specific patient on a worklist by clicking the Filter button.



Dr. Test 🗡

Recipient



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Managing Inbound Referrals

Inbound referrals may be received via Referral Management or other means. Referrals received by other means must be manually added to the appropriate Referral Management worklist.

Managing an inbound referral received via Referral Management:

1. Select Receiving Worklist from within Referral Management.

Referral Management

Referral Management

ZZZZVISIONTEST, P... DOB: JAN 01, 1959

Worklist Receiving-

Patient

Referral Management
Worklist Receiving-

 \times +

Referred.

Test MD, Ph..

Insurance

06/28/2021.

Request

Urology

Testina

Scheduling

Referred.

AuSable Uro.

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Unassigned

Status

MRN: 4009897 FIN: 54898829

Assign to me

Accept

Pending Acceptance

Reject

Assian

er: 76007

2. The Status of **Pending Acceptance** indicates an inbound referral that needs reviewed and accepted if the referral

Patient-Centric Referrals

Insurance

Medicare Pa...

Documents (1)

62 yrs Male DOB: JAN 01, 1959

Status: Pending Acceptance Edit

Please Accept or Reject the referral.

Substatus: -- Edit

ZZZZVISIONTEST, PATIENT TWO

List Maintenance

Comments

Indicators

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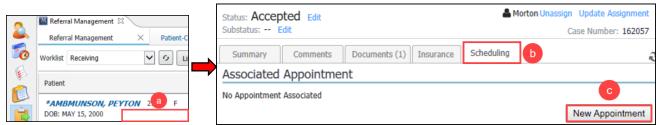
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Summary

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- is appropriate.Click in the white space next to the patient's name to view the referral details.
- 4. Review each tab of the referral details.
- 5. If the referral is appropriate, click Assign to Me.
- 6. Click Accept.
 - a. If the referral is not appropriate, click Reject and enter a comment.
- 7. The Status will change to Accepted. Status: Accepted
- 8. The status Accepted indicates that the referred patient needs to be scheduled.
- 9. Schedule the patient from within **Revenue Cycle Referral Management**. (Patients are unable to be scheduled from within **PowerChart Referral Management**).
 - a. Click in the white space next to the patient name to open the referral details.
 - b. Click on the **Scheduling** tab.
 - c. Click New Appointment.



- d. Proceed with the current Appointment Scheduling process.
- e. Once the Appointment is Confirmed and Scheduled, the Referral Management Status will show as Scheduled.

0	📓 Referral Management 🛛								
	Referral Management X	Patient-	Centric Referrals	× +					
i	List Maintenance								
Solution	Patient	Ind	Insura	Referr	Reque	Referr	Status		
	*AMBMUNSON, C DOB: OCT 20, 1995	D	🗞 Priorit	Test MD, 07/02/20	Urology hematuria	AuSable U	Scheduled 07/07/2021 14:00		



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Patient-Centric Referrals X

1. Patient Info

Documents

Action

Add

2. Do

Subject

Consult Note

Case Details

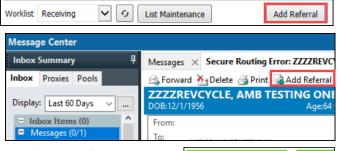
Available Docum... Begin 09/19/2021

Date

3 0/08/2021

Managing an inbound Referral received from other means:

- From Referral Management Worklist:
 - 1. Click Add Referral from within Referral Management.
 - 2. Search for and select the correct patient.
- From Message Center:
 - 1. Open the incoming referral message.
 - 2. Click Add Referral within Message Center.



Referral Management

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- 3. From the Documents tab, attach any associated Documents for the referral by clicking Add next to the correct document(s).
 - a. Click on the Document to open a preview on the right side of the screen.
- 4. Click on Case Details.
- 5. Enter the incoming Referral information.
 - a. Medical Service is the service or specialty the patient is being referred to. Select only the lower case choices. DO NOT use the all CAPS services.
 - b. Fill in all required fields and any additional information available.
 - c. Refer to Provider or Location must be filled in. Both may be entered if appropriate. Use the magnifying glass to search for the Provider or Location.

Cancel

Submit

- 6. Click **Next**.
- Next
- 7. Review the Case Details and Click Accept Referral.
- 8. Click Submit.
- 9. The Referral Status will now show Accepted.

Next

10. Schedule the patient from within Revenue Cycle Referral Management following the previous steps above.

*Ref

MHC

Completing Referrals

Completing Referrals is a manual process that must be done on outbound referrals and inbound referrals that are manually added to the Receiving Worklist.

Completing Referrals:

1. Once referral visit documentation is either received back from the referred to facility (for outbound referrals) or completed by the provider at your practice (for inbound referrals), navigate to either:

1. Patient In	rormation	2. Documents/Case Details
Documents	Case Details	4
*Medical Service Urology	a	
*Referral Reason hematuria	1	
Refer to Provider Not Specified		C
*Refer to Location MHC Bay Area Urol	ogy Traverse Cit	у

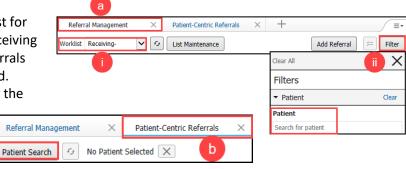




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Referral Management for Referral Coordinators

- a. Referral Management Worklist.
 - Select Originating Worklist for outbound referrals or Receiving Worklist for inbound referrals that have been completed.
 - ii. Click **Filter** and Search for the patient.
- b. Patient-Centric Referrals.
 - i. Click Patient Search.



- ii. Search for and select the correct patient and click OK.
- iii. All referrals listed for the selected patient will display.
- 2. Open the referral case details by clicking on the white space next to the patient's name.
- 3. Navigate to the Documents tab within Referral Management Case Details.
- 4. Locate the documentation in the Available Documents for the associated referral visit.
- Select Add next to the provider's note to associate the document to the referral case (if able to select from Available Documents).

	Summary	Comments	Documents (1)	Insurance	Scheduling						
	Attached Documents										
	Action	Date	Subject	Author	Туре	Source					
	Remove	07/02/2021	Continuity of C	Morton RN, Bri	Continuity of C	CAMM					
	Available	Documents	Begin 06/1	2/2021	End 07/12/20)21					
	Action	Date	Subject	Author	Туре	Source					
5	Add	06/22/2021	Care Managem	TSTAcctLopez	Chronic Care M	Clinical (4)					
T	Add	06/22/2021	Ambulatory Vis	TSTAcctLopez	Ambulatory Cli	Clinical					

- 6. From the **Receiving Worklist**: Update the status to Completed once the Patient has been Seen and visit documentation has been sent to the referring location.
 - a. Click Edit next to Status.
 - b. Select **Completed**.
 - c. Click Submit.



 From the Originating Worklist: Update the Status to Closed by clicking on Close to indicate the Referral visit is complete and all documentation has been received back.

