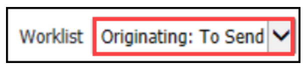
Referral Management for Referral Coordinators

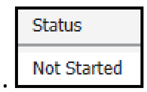
Summary: Referral Management provides a streamlined means to transfer and monitor inbound and outbound referrals. Referral Management also offers integration with Revenue Cycle scheduling for a seamless workflow to manage inbound referrals. This document provides instructions on managing inbound and outbound referrals and completing referrals.
Support: Ambulatory Informatics at 231-392-0229.

Sending Outbound Referrals

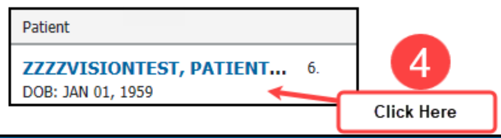
Once an Ambulatory Referral is ordered, the referral must be generated and sent to the referred to provider or facility by following the below steps.

1. Click Referral Management on the top toolbar in PowerChart [Referral Management] or the Referrals Icon 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.
2. Select the Worklist **Originating: To Send**.

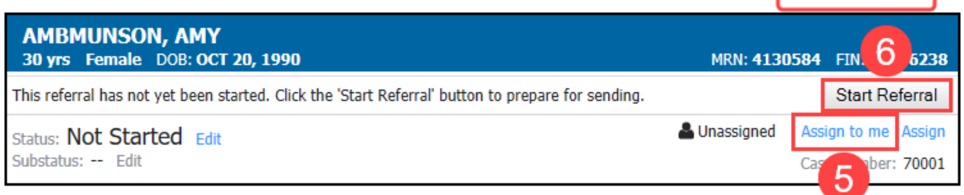




3. The Status Not Started will indicate the Referral has not been started.
4. Click in the box next to the patient's name. (Clicking directly on the patient's name will open their chart).

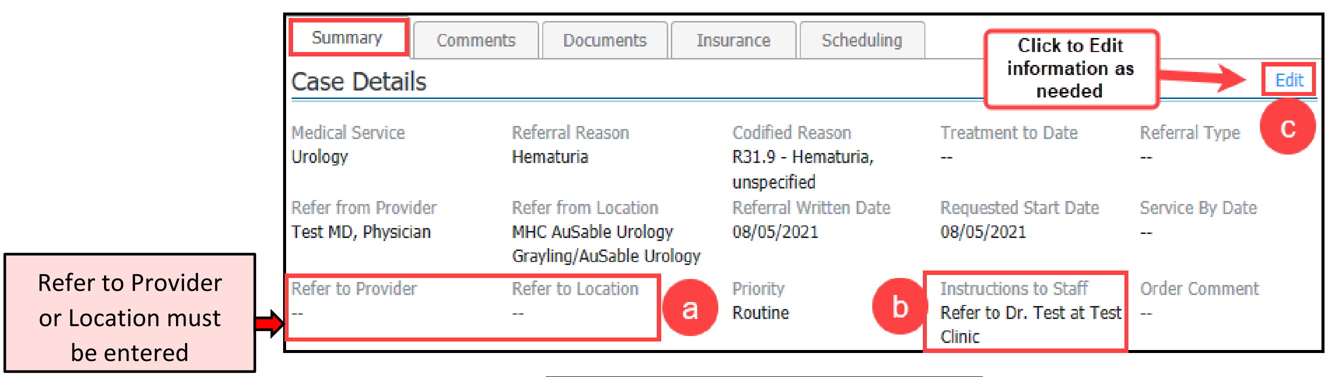


5. Click **Assign to me**.
   a. This will indicate who is working the referral. It will not remove any referrals from the list.
6. Click **Start Referral**.

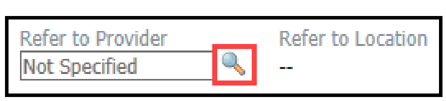


7. The Status will change to Prep for Send.

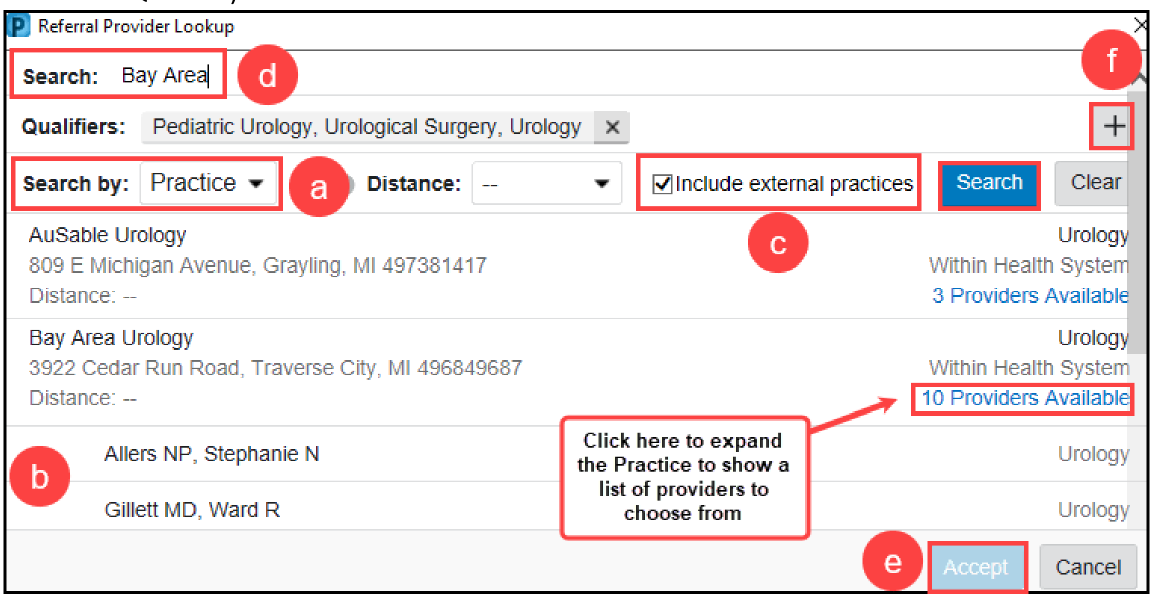
8. Review Summary tab.
   a. Ensure the Refer to Provider or Location is entered. This **must be** entered to Generate a referral.
   b. If refer to information is entered in Instructions to Staff, it must be added to the Refer to Provider field.
   c. To add the Refer to Provider/Location: click **Edit**.



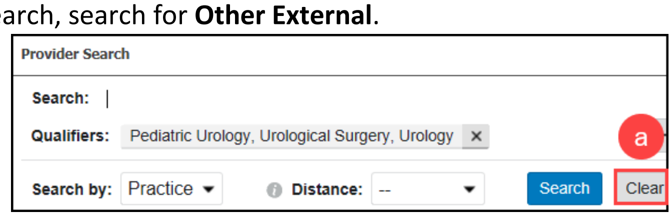
   d. Click the **Magnifying glass** to search.



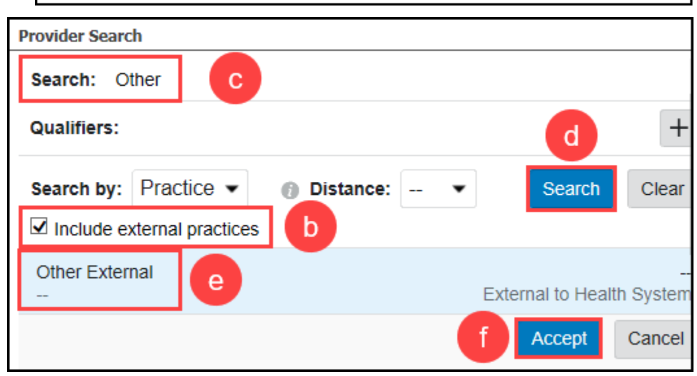
- Using the Refer to Provider Lookup:
    a. Select **Search by** Provider or Practice.
    b. The list of Providers or Practices that displays is based on the Medical Service selected on the order.
    c. Select **Include external practices** if needed.
    d. Type the Provider or Practice name in the 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).



- 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.

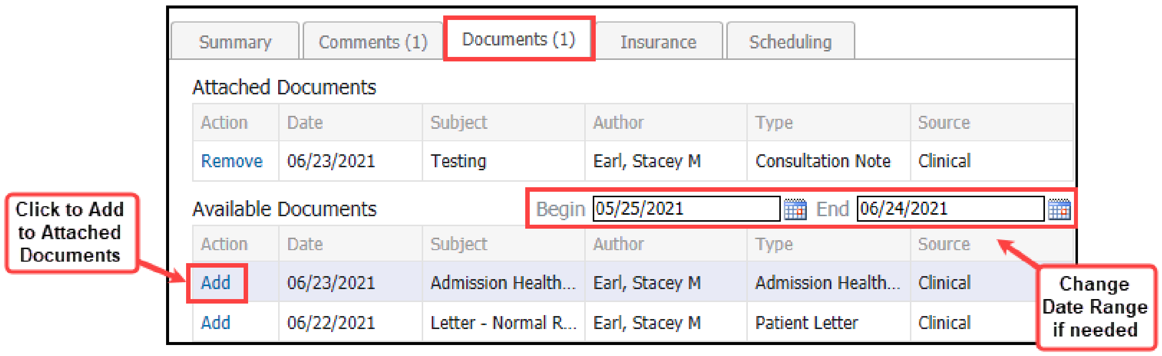


    b. Check the box to **Include external practices**.
    c. Type **Other** in the Search field.
    d. Click **Search**.
    e. Highlight **Other External**.
    f. Click **Accept**.

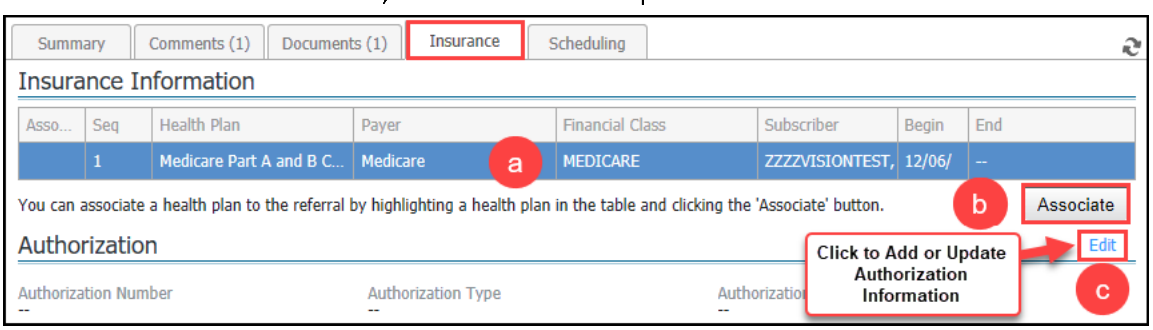


9. Comments tab:
    a. Enter any comments related to the referral and click **Save**.

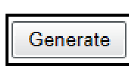
10. Documents:
    a. Click **Add** under Available Documents to attach Documents to the outbound Referral.
    b. Change the date filter for Available Documents if needed.



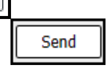
11. Insurance:
    a. Select the correct **Health Plan** to associate to the Referral.
    b. Click **Associate**.
        a. Only one Insurance may be associated to a referral case, but if the patient has multiple insurances listed, they will be viewable on the referral information being sent.
    c. Once the Insurance is Associated, click **Edit** to add or update Authorization Information if needed.



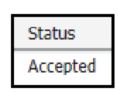
12. Click **Generate** when ready to send the Referral.



13. Review the Referral Summary Case Details and click **Send**.



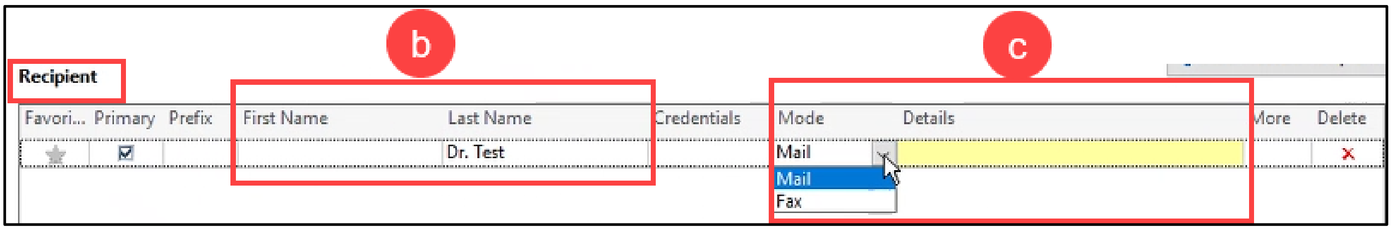
14. If sending the referral to an **internal practice**, the referral will show up on the receiving practice's Referral Management Worklist and the Status will show as Pending Acceptance.
    a. Once the Receiving practice accepts the Referral, the Status will change to Accepted.



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.

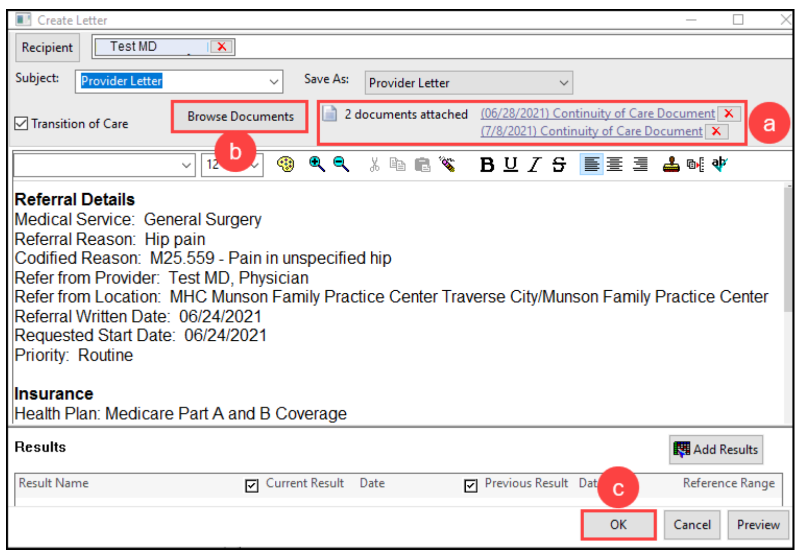
b. The Recipient details can be edited as appropriate by clicking in each field (First Name, Last Name, etc.).
c. The preferred **Mode** of communication can be selected from a drop-down list.
   - If **Mail** is selected, click in the required yellow **Details** field to add the mailing address.
   - 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**.

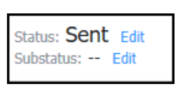


17. The Provider Letter will show the added recipient details in the Recipient field.

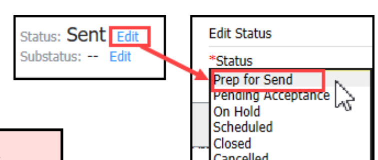
a. Review the letter and attached documents.
b. Click **Browse Documents** to attach additional Documents.
c. Click **OK** to send the letter.



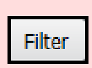
18. The Referral Status will update to Sent.



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.

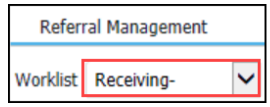


Managing Inbound Referrals

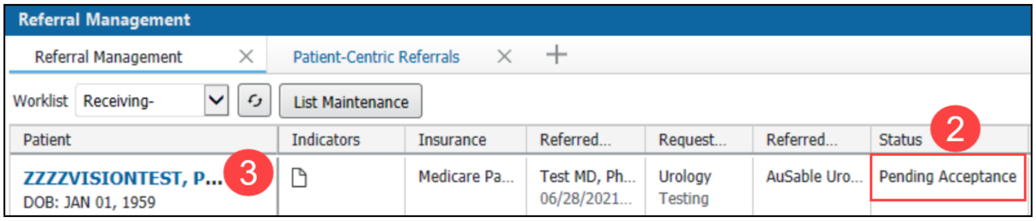
Inbound referrals may be received via Referral Management or other means. Referrals received by other means must be manually added to the appropriate Referral Management worklist.

Managing an inbound referral received via Referral Management:

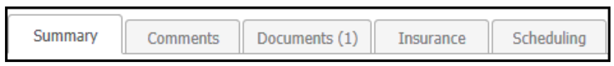
1. Select **Receiving** Worklist from within Referral Management.



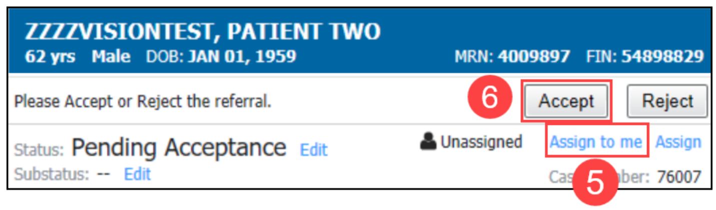
2. The Status of **Pending Acceptance** indicates an inbound referral that needs reviewed and accepted if the referral is appropriate.
3. Click in the white space next to the patient's name to view the referral details.



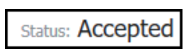
4. Review each tab of the referral details.



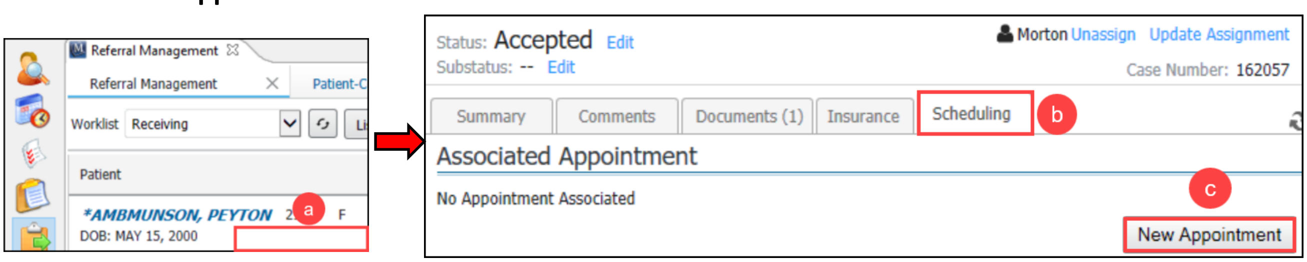
5. If the referral is appropriate, click **Assign to Me**.
6. Click **Accept**.
   a. If the referral is not appropriate, click Reject and enter a comment.



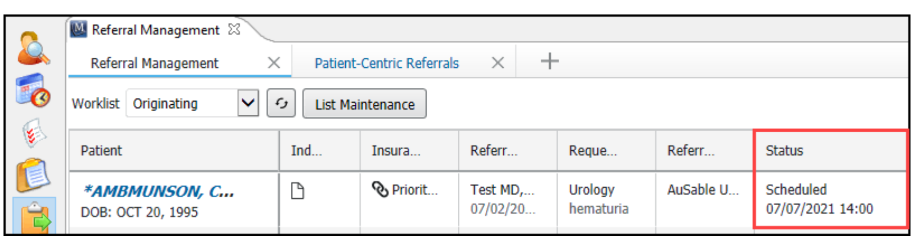
7. The Status will change to Accepted.



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**.



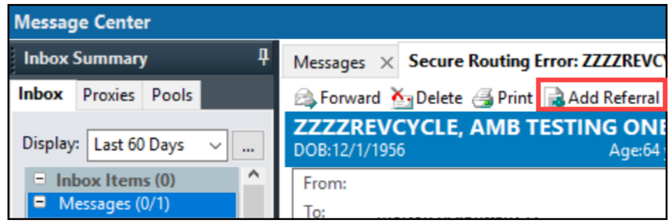
   d. Proceed with the current Appointment Scheduling process.
   e. Once the Appointment is Confirmed and Scheduled, the Referral Management Status will show as Scheduled.



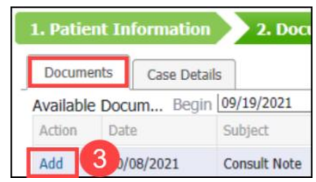
Managing an inbound Referral received from other means:

- 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.

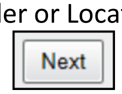


3. From the Documents tab, attach any associated Documents for the referral by clicking **Add** next to the correct document(s).
    a. Click on the Document to open a preview on the right side of the screen.

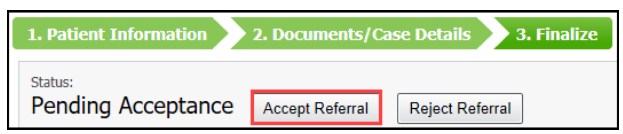


4. Click on **Case Details**.
5. Enter the incoming Referral information.
    a. Medical Service is the service or specialty the patient is being referred to. Select **only the lower case** choices. **DO NOT** use the all CAPS services.
    b. Fill in all required fields and any additional information 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.

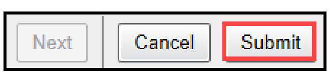
6. Click **Next**.



7. Review the Case Details and Click **Accept Referral**.



8. Click **Submit**.



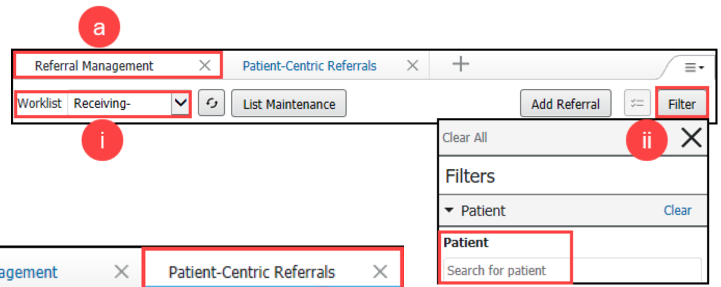
9. The Referral Status will now show Accepted.
10. Schedule the patient from within Revenue Cycle Referral Management following the previous steps above.

Completing Referrals

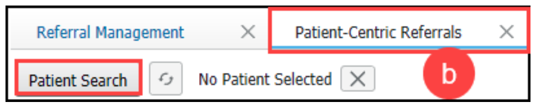
Completing Referrals is a manual process that must be done on outbound referrals and inbound referrals that are manually added to the Receiving Worklist.

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:

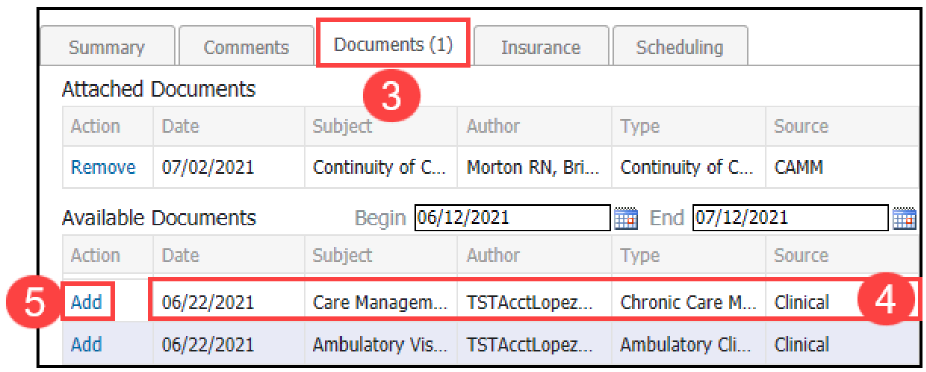


a. Referral Management Worklist.
   i. Select Originating Worklist for outbound referrals or Receiving Worklist for inbound referrals that have been completed.
   ii. Click **Filter** and Search for the patient.
b. Patient-Centric Referrals.
   i. Click **Patient Search**.

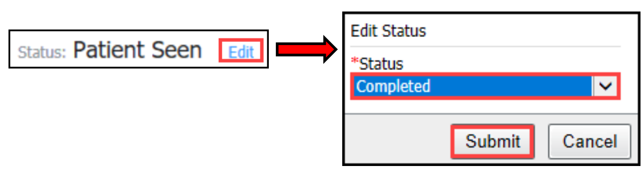


   ii. Search for and select the correct patient and click **OK**.
   iii. All referrals listed for the selected patient will display.

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.
5. Select **Add** next to the provider's note to associate the document to the referral case (if able to select from Available Documents).



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**.



7. 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.