

Referral Summary Exchange Documents for Referral and Clinical Staff

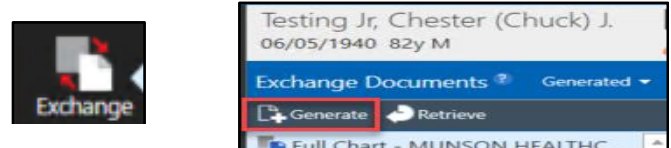
Intergy EHR, Ambulatory JOB AID

Generating and Sending a Referral Summary Exchange Document

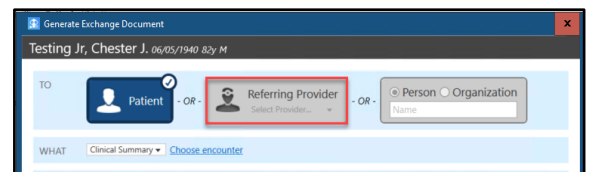
Prior to generating a Referral Summary Exchange Document, ensure the referring provider has been added to the patient's Care Team. *Refer to the Care Team Provider Addition or Deletion job aid.*

From the patient's chart in Intergy EHR, go to the Exchange module.

Choose Generate.

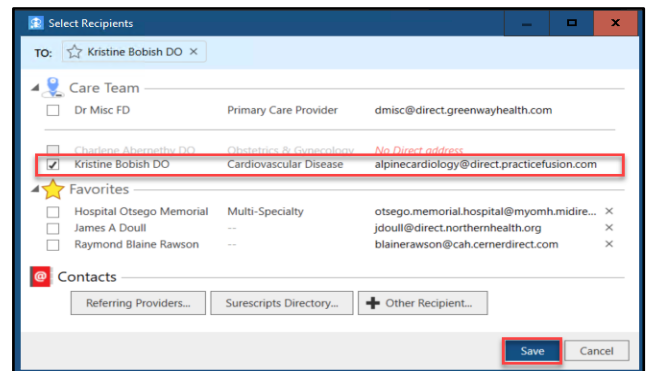


Click on the Referring Provider caret to choose to whom the document will be sent.



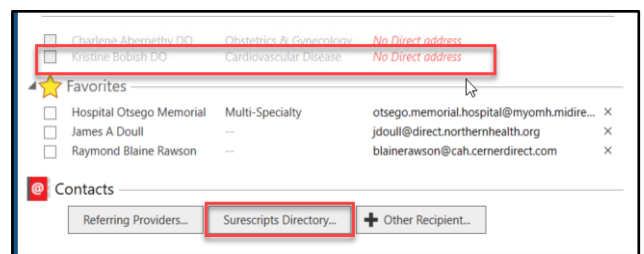
The Select Recipients window will open.

The Referring Provider should be found under the Care Team. If the provider has a Direct Address, check the box to the left of the provider's name and click Save.



OR

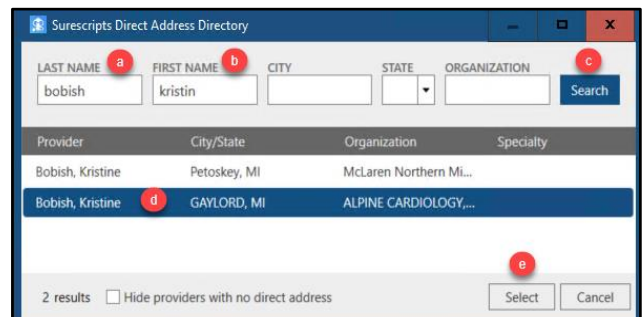
If the provider has No Direct Address in the Intergy database, select Surescripts Directory.



The Surescripts Direct Address Directory will open.

- Enter the provider's Last Name.
- Enter the provider's First Name.
- Click Search.
- Highlight the provider.
- Click Select.

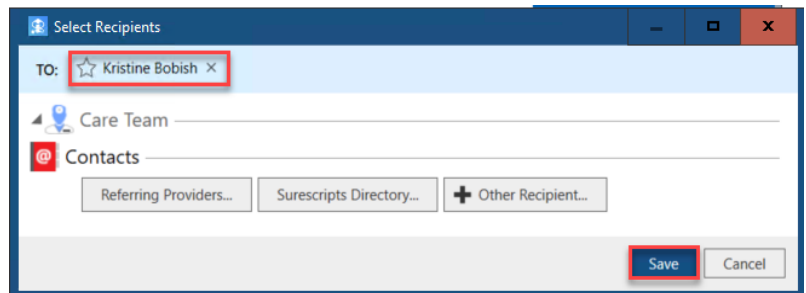
If no direct address is found for the provider in the Surescripts Direct Address Directory, choose Cancel. An exchange document cannot be sent.



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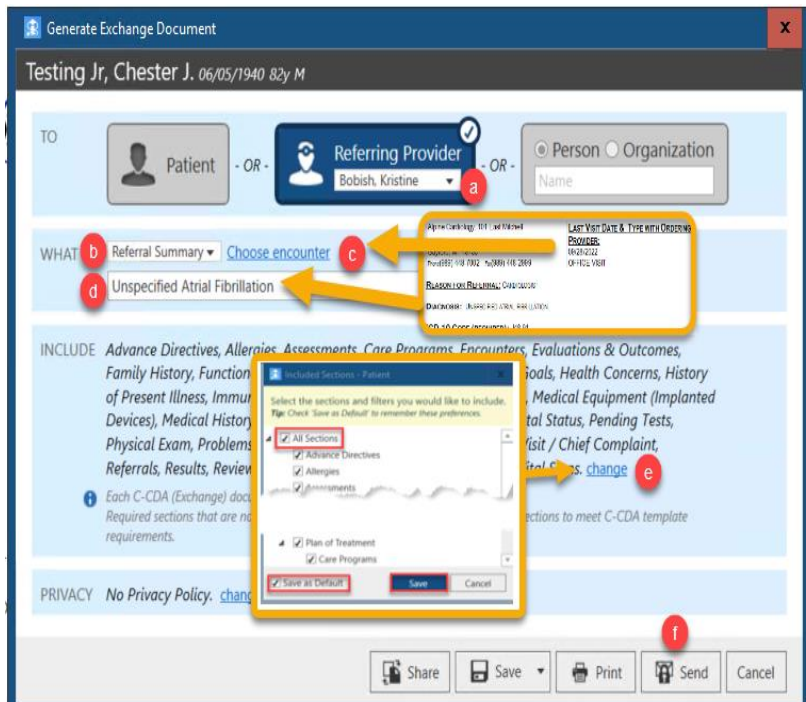
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If a provider with a direct address was selected from the Care Team or the Surescripts Directory, the Select Recipients window will open with the selected provider as the recipient. Click Save.



The Generate Exchange Document window will reopen.

- Verify the recipient.
- Select Referral Summary.
- Choose the encounter associated with the referral. This will be reflected under Last Visit Date & Type with Ordering Provider on the referral correspondence.
- In the Reason for Referral field, enter the diagnosis description found on the referral correspondence.
- The first time sending an exchange document, click [change](#). Check All Sections, Save as Default and Save.
- Click Send



The Direct Message window will open.

- The To provider will auto-generate from the Exchange Document.
- Enter Referral Summary in the Subject field.
- Choose the ordering provider as the Related Provider.
- Select any attachments to send with the summary. i.e., lab results, radiology reports, etc.
- Check the referral order to link it.
- Check Save message to patient chart and Request for Exchange Document from Referring Provider.
- Click Send.

