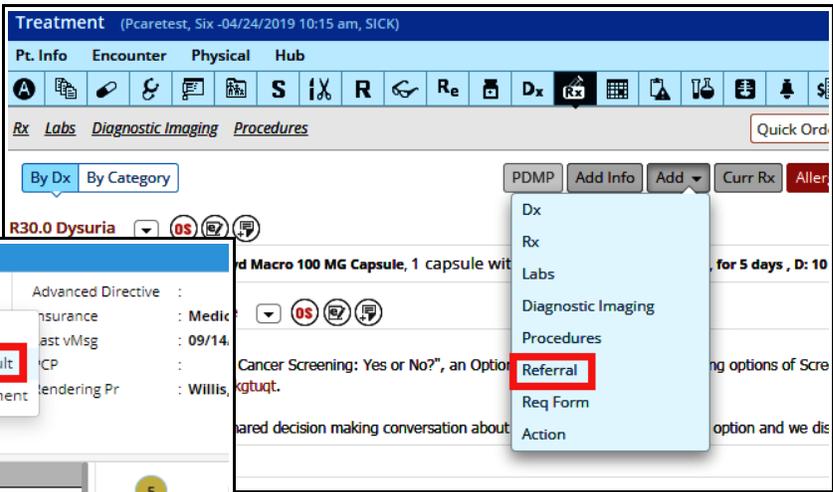# Sending a Referral from a PCP Office in ECW 11e
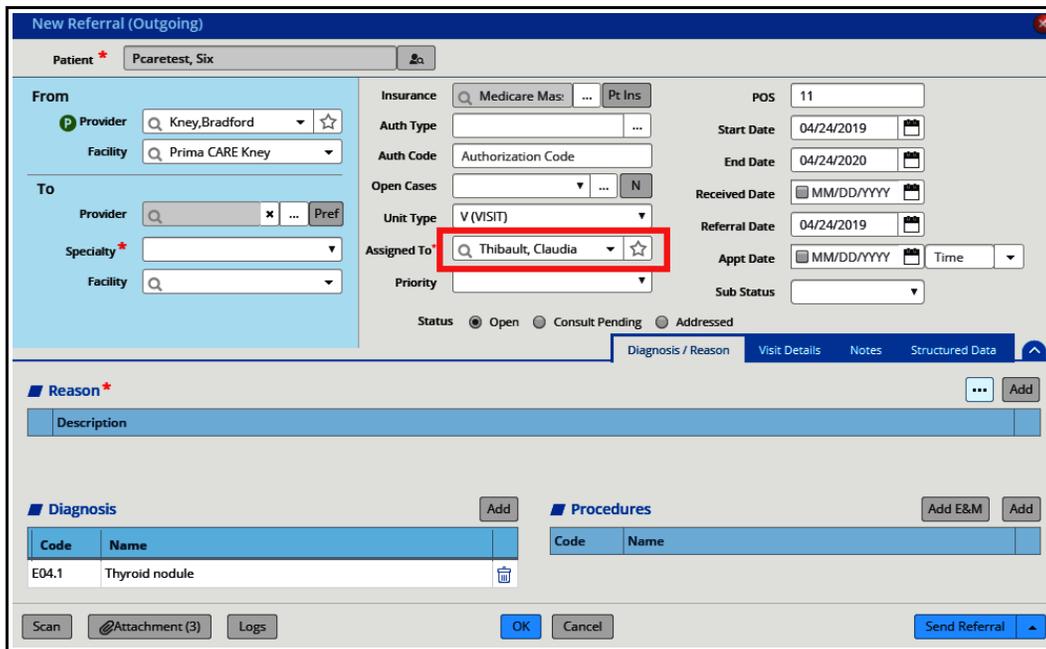
Sending a referral is a little complicated – in this document, I will explain this workflow step by step.

To open the referral screen, either use "Add" → "Referral" from the Treatment section of a note, OR

choose "Send P2P Referral/Consult" from the Hub.

Either way, the referral screen shown above opens. Some offices send all their referrals to one person (Claudia), while other offices send the referrals to the referral coordinator in each specialty office. The list of referral coordinators in each specialty office can be found on the last page of this document.

In this example, I am going to set up a referral to Dr. Lakshman for a patient with a thyroid nodule. When searching providers, always choose the entry with the "D" next to the name if it is avaliable – it is more secure then "P". If "D" not not available, choose "P". If neither "D" nor "P" is available, the provider is not on our P2P network. You will need to fax the referral information to non-P2P providers.

Now choose the specialty from the dropdown list – this is required. In this case, since I started this referral from the Treatment screen under the diagnosis of thyroid nodule, I don't need to add a diagnosis. However, if the wrong diagnosis is listed, or no diagnosis is listed, you will need to correct this (using the trash can to delete the diagnosis if necessary, and the "Add" button to add a diagnosis).

Using Smart Search, I can find and add another diagnosis if needed.
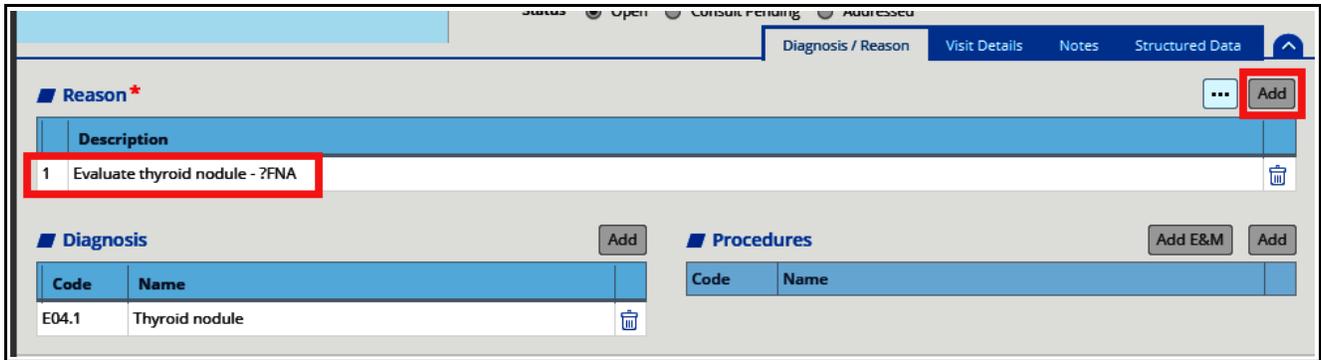
Now, click "Add" to add a line under "Reason" - and type in the reason for the referral.
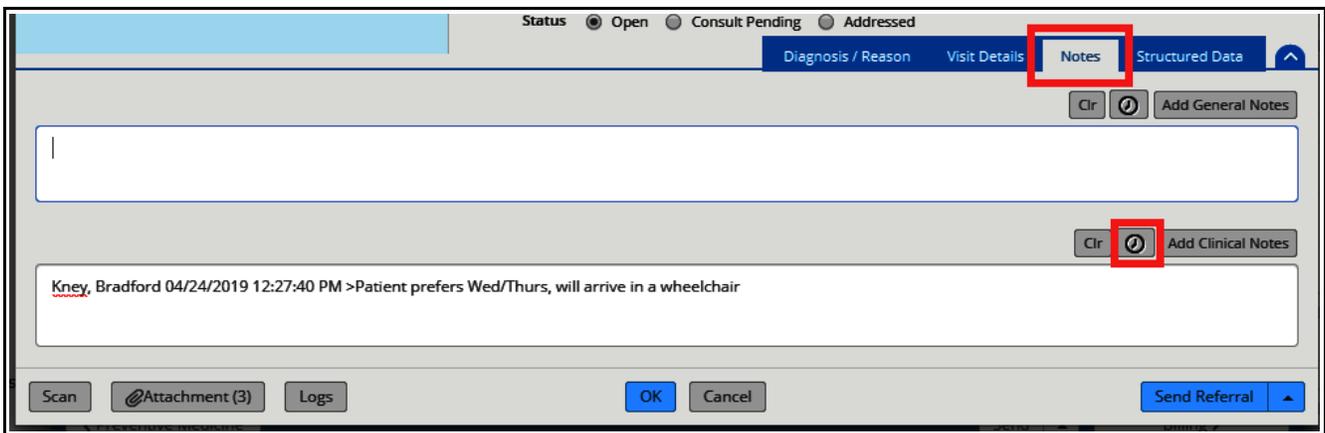
Next, add a clinical note – timestamp this, and type in anything the specialty office should know – patient preferences, translator needs, physical needs – anything you would want to know prior to seeing this patient. Be sure to use the "Clinical Notes" area, NOT the "General Notes" area. Anything you put in the "General Notes" area will be published to the portal.

Now you are ready to attach documents to this referral.
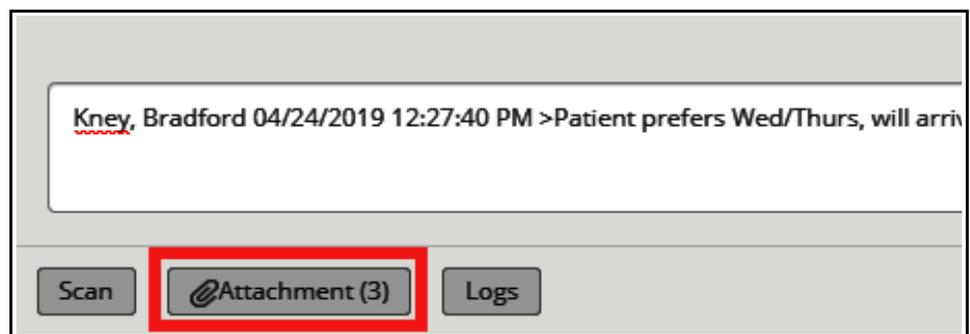
ECW automatically attaches the medical summary and CCR and CCD to the referral (Continuity of Care Record and Continuity of Care Document). These documents are based upon Health Level-7 (HL7) Clinical Document Architecture for transfer of information critical to continuity of care – more than you really wanted to know. Anyway, this basic health information is pulled from ECW and attached automatically to the referral (I think it is similar to what we see in the basic eEHX transfers from the certain hospitals).

In this case, the visit note from which I was generating this referral was automatically attached as well (clicking on the eye icon the the left of the visit date opens a preview of the note). Clicking on the "+" icon to the far right opens the encounters list.

From here, I can attach any notes I feel are needed for the specialist visit.

I can also add labs, DI, or other patient documents to the referral. The report of a previous thyroid ultrasound would be helpful to add to this referral. This would be especially true if the US was done outside of Prima CARE – and perhaps scanned into patient documents.

Now you are ready to "OK" the referral – DO NOT HIT SEND! The referral will now go to the either Claudia (for some offices using one workflow) or Michelle Valkanos in Dr. Lakshman's office (for offices using a different workflow).

This is where the referral process ends for the PCP office.

If the referral goes to Claudia, she will forward it to the appropriate referral coordinator in the specialty office. The specialty office will then contact the patient and make the appointment. If a referral authorization is needed, the referral with then be assigned to Central Referrals, and authorization will be obtained. The authorization code will be entered in the referral screen, and at that point, Central Referrals will hit "Send Referral", and assign the referral back to the PCP office manager to close the loop – and the office manager will change the status to "Addressed". By hitting the "Send Referral" button, a separate incoming referral will be generated for the specialty office.

If no authorization is needed, the specialty office referral coordinator will hit "Send Referral", and assign in back to the PCP office – where the PCP office manager will change the status to "Addressed".

Brad Kney, MD
April 24, 2019

Referral Managers (as of 4/30/19)

Allergy	Amanda Marshall
Chiropractic	Diane Benjamin
Endocrinology	Michelle Valkaos
Gastroenterology	Blanca Rivera
Gynecology	Brenda Pereira
Neurology/Douglas	Crystal Brehaut
Neurology/Dudha	Ashlin Pimentel
Neurology/Kundo	Tracy Gabus
Neurology/Morcos	Ana Pereira
Neurology/Steinberg	Lisa Bannister
Optometry	Nicole Botelho
Orthopedics	Rose Paquette
Otolaryngology	Heather Taborda
Podiatry	Judi Costa
Pulmonary	Cheryl Quinlan
Rheumatology/Rahman	Judith Vieira
Rheumatology/Fisher	Rose Paquette
Vascular	Laura Rose Newcomb
Sleep Medicine	Lynn Lamontagne
Medi Weight Loss	Dawn Depasquale
Physical Therapy	Kelly Levesque