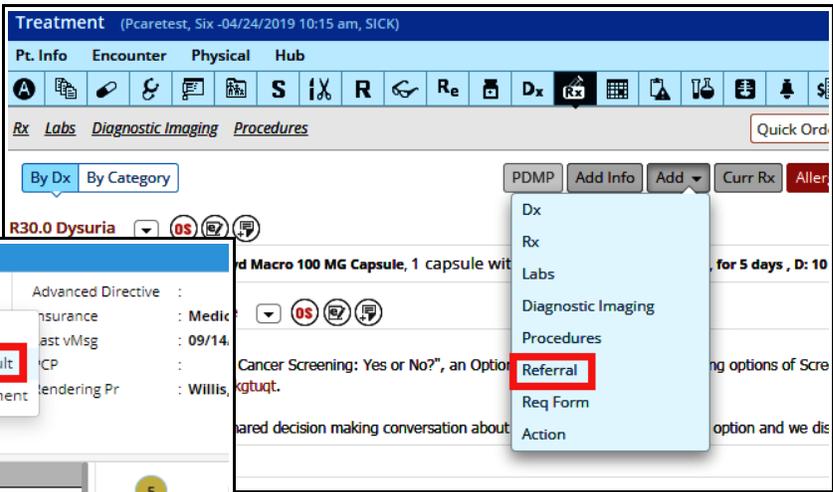


Sending a Referral from a PCP Office in ECW 11e

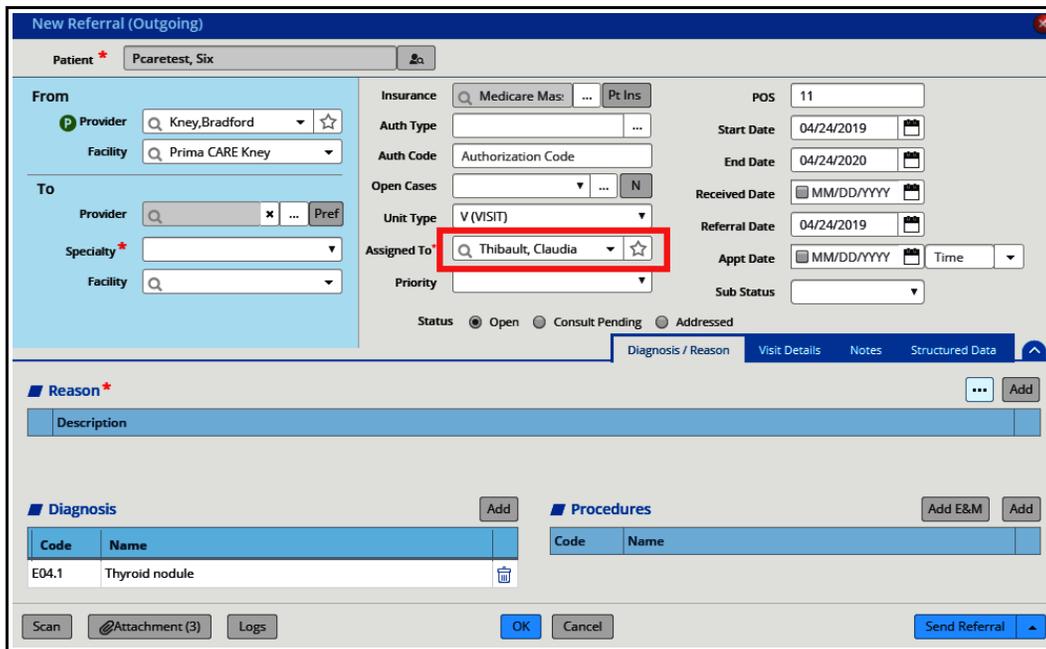
Sending a referral is a little complicated – in this document, I will explain this workflow step by step.

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



The screenshot shows the EHR interface for a patient named Pcaretest, Six. The 'Add' dropdown menu is open, and 'Referral' is highlighted. The patient's information is visible on the left, including their name, age, gender, and contact details. The 'Structured Data' section shows various categories like Veteran, Seasonal, Migrant, and Homeless. The 'Actions' section shows a count of 5 for Labs and 1 for Actions.

choose “Send P2P Referral/Consult” from the Hub.



The screenshot shows the 'New Referral (Outgoing)' form. The 'From' section includes the provider 'Kney, Bradford' and facility 'Prima CARE Kney'. The 'To' section includes the provider 'Thibault, Claudia' and a specialty dropdown. The 'Reason' section has a description field. The 'Diagnosis' section has a table with one entry: 'E04.1 Thyroid nodule'. The 'Procedures' section has an 'Add E&M' button. The form also includes fields for insurance, auth type, auth code, open cases, unit type, assigned to, priority, status, POS, start date, end date, received date, referral date, appt date, and sub status. The 'Assigned To' field is highlighted with a red box.

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.

P2P Provider Lookup					
All Providers		All N/w Affiliations		<input type="checkbox"/> Accepts Patient Insurance	
laksh		Specialty	City	Zip Code	All states
P	Provider Name	Specialty	Address	Contact	Aff
<input type="radio"/>	Lakshman,M,Kishore	Endocrinology	277 Pleasant Street Fall River, MA 027213005	508-235-0481 508-235-1034	
<input type="radio"/>	Lakshman,M,Kishore		P O Box 1029 Fall River, MA 02722	508-235-0481 508-235-1034	
<input type="radio"/>	D Lakshman, Kishore MATTAPPILLY	Endocrinology, Diabetes & Metabolism, Internal Medicine	289 PLEASANT ST, SUITE 604, FALL RIVER, MA-02721	5086467710 5086467714	<input type="checkbox"/>
<input type="radio"/>	Lakshman, Venk	Gastroenterology, Internal Medicine	PO BOX 3012, WILSON, NC-27895	2522065622 2522065623	<input type="checkbox"/>

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 available – it is more secure than “P”. If “D” 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).

New Referral (Outgoing)

Patient * Pcaretest, Six

From

Provider: Kney,Bradford
Facility: Prima CARE Kney

To

Provider: Lakshman, Kis
Specialty: **Endocrinology**
Facility:

Insurance: Medicare Mas
Auth Type: Authorization Code
Open Cases: N
Unit Type: V (VISIT)
Assigned To: Thibault, Claudia
Priority:

Status: Open Consult Pending Ad

Reason *

Description:

Diagnosis **Procedures**

Code	Name
E04.1	Thyroid nodule

Select Assessments Pcaretest, Six

Patient Previous Diagnosis		Patient Problem List	
Code	Diagnosis	Code	Diagnosis
I10	Essential (primary) hypertension	F17.200	Tobacco dependence
E11.22	Type 2 diabetes mellitus with d...	E78.00	Pure hypercholesterolemia
E78.0	Pure hypercholesterolemia	Z68.30	Body mass index (BMI) of 30.0...
J45.20	Mild intermittent asthma, unco...	R41.3	Amnesia
J18.1	Pneumonia of left upper lobe ...	D69.6	Thrombocytopenia
N30.90	Cystitis	J44.9	Chronic obstructive pulmonary...
Z98.84	Bariatric surgery status	E11.22	Type 2 diabetes mellitus with d...
R53.83	Fatigue, unspecified type	I10	Essential hypertension
K63.5	Colon polyp	E04.1	Thyroid nodule

Smart Search

ICD-9 ICD-10 Diagnosis

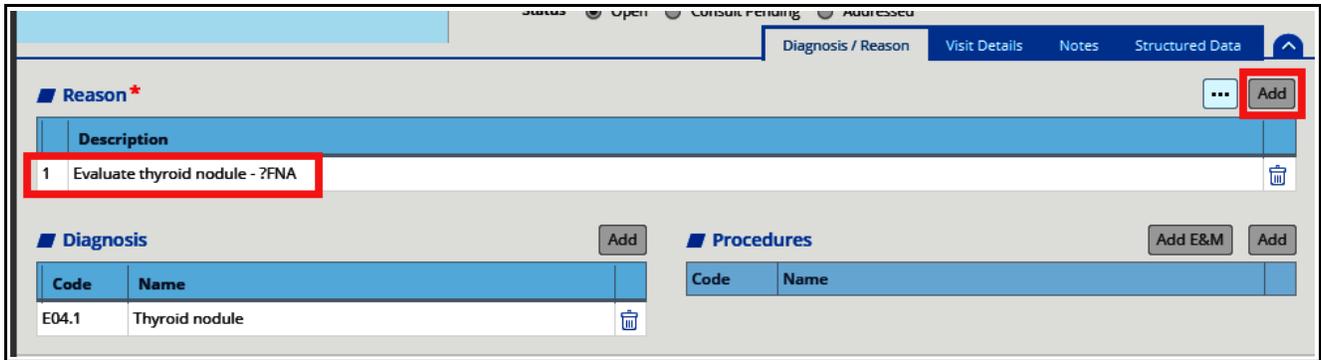
goiter

ICD-9	ICD-10	Diagnosis
240.9	E04.9	Goiter
242.30	E05.20	Goiter colloid, toxic, nodular
246.1	E03.0	Goiter congenital
240.9	E04.9	Goiter diffuse
241.9	E04.9	Goiter diffuse, adenomatous
240.9	E04.0	Goiter diffuse, nontoxic
246.1	E07.1	Goiter due to enzyme defect in synth...
240.9	E04.9+	Goiter due to thyroiditis
240.9	E04.9	Goiter or struma

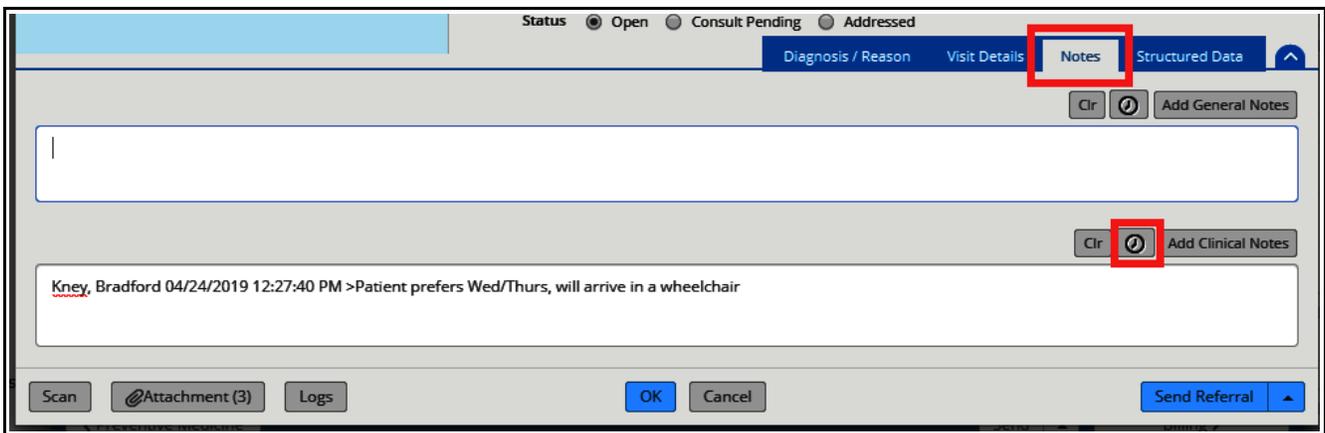
Selected Assessment(s)

Code	Diagnosis
E04.1	Thyroid nodule

Using Smart Search, I can find and add another diagnosis if needed.

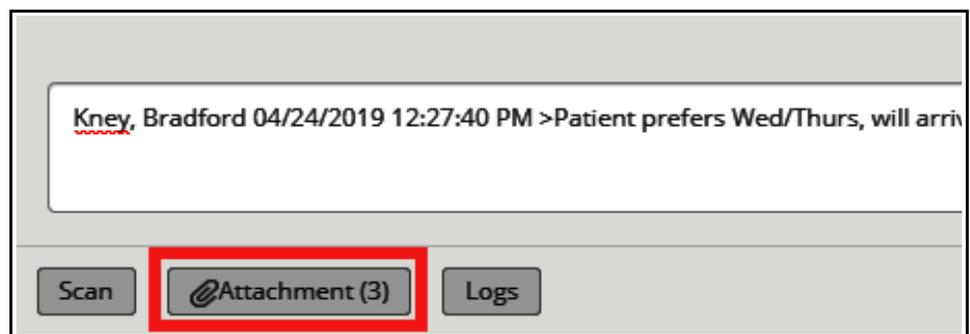


Now, click “Add” to add a line under “Reason” - and type in the reason for the referral.



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.



New Referral (Outgoing)

Attach Medical Summary
 Attach CCR/CCD (CCR/CCD available only when sending via eCW P2P)

Progress Notes (1)

PREVIEW	DATE	REASON
	04/24/2019	

Lab Reports (0)

PREVIEW	NAME	REASON	RESULT
---------	------	--------	--------

X-Rays (0)

PREVIEW	NAME	REASON	RESULT
---------	------	--------	--------

Patient Documents (0)

PREVIEW	NAME	DESCRIPTION
---------	------	-------------

213.30 KB / 2 MB

OK Cancel

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.

LookUp Encounters

Pcaretest, Six

Provider Encounters

		Date	Time	Type	Status	Provider	Facility	Reason
<input type="checkbox"/>		04/24/2019	10:15 AM	SICK	PEN	Kney, Bradford	Prima CARE Kney	
<input checked="" type="checkbox"/>		04/16/2019	01:00 PM	SICK	PEN	Kney, Bradford	Prima CARE Kney	
<input type="checkbox"/>		04/10/2019	09:00 AM	OV	CANC	Kney, Bradford	Prima CARE Kney	PCP test
<input type="checkbox"/>		04/09/2019	04:45 PM	F/U	CANC	Baker, Richard E	Prima Care Podiatry	
<input type="checkbox"/>		03/17/2019	01:35 PM	OV	CANC	Kney, Bradford	Prima CARE Kney	PCP allergy
<input type="checkbox"/>		01/06/2019	11:00 AM	OV	PEN	Kney, Bradford	Prima CARE Kney	PCP Test
<input type="checkbox"/>		10/19/2018	01:35 PM	ANN VISIT	CANC	Willis, Sam	Prima CARE PC	
<input type="checkbox"/>		09/09/2018	10:00 AM	OV	PEN	Kney, Bradford	Prima CARE Kney	PCP test

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.

The screenshot shows a software interface with four main sections:

- Progress Notes (1)**: A table with columns PREVIEW, DATE, and REASON. One entry is visible with the date 04/24/2019.
- Lab Reports (0)**: A table with columns PREVIEW, NAME, REASON, and RESULT. A red box highlights the right side of this section, showing a plus icon and a minus icon.
- X-Rays (0)**: A table with columns PREVIEW, NAME, REASON, and RESULT. A red box highlights the right side of this section, showing a plus icon and a minus icon.
- Patient Documents (0)**: A table with columns PREVIEW, NAME, and DESCRIPTION. A red box highlights the right side of this section, showing a plus icon and a minus icon.

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).

The screenshot shows a "New Referral (Outgoing)" form with the following details:

- Patient**: Pcaretest, Six
- From**:
 - Provider: Kney, Bradford
 - Facility: Prima CARE Kney
- To**:
 - Provider: Lakshman, Kis
 - Specialty: Endocrinology
 - Facility: [Empty]
- Insurance**: Medicare Mas: [Empty] Pt Ins
- Auth Type**: [Empty]
- Auth Code**: Authorization Code
- Open Cases**: [Empty] N
- Unit Type**: V (VISIT)
- Assigned To**: Valkanos, Michelle
- Priority**: [Empty]
- POS**: 11
- Start Date**: 04/24/2019
- End Date**: 04/24/2020
- Received Date**: [Empty] MM/DD/YYYY
- Referral Date**: 04/24/2019
- Appt Date**: [Empty] MM/DD/YYYY Time
- Sub Status**: [Empty]
- Status**: Open Consult Pending Addressed

At the bottom of the form, there are buttons for "Scan", "Attachments (3)", "Logs", "OK" (highlighted with a red box), "Cancel", and "Send Referral" (crossed out with a red X).

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 will 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