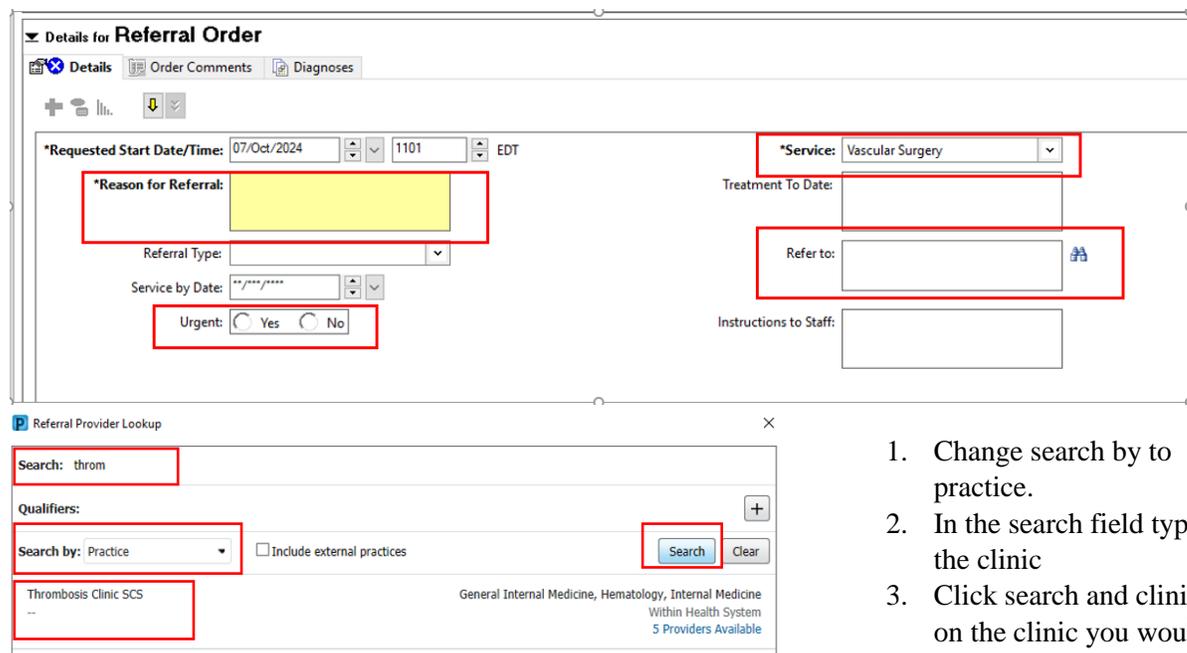


## REFERRAL: SENDING AN INTERNAL REFERRAL

### 1. Provider will place an "Referral Order"

#### Key Points:

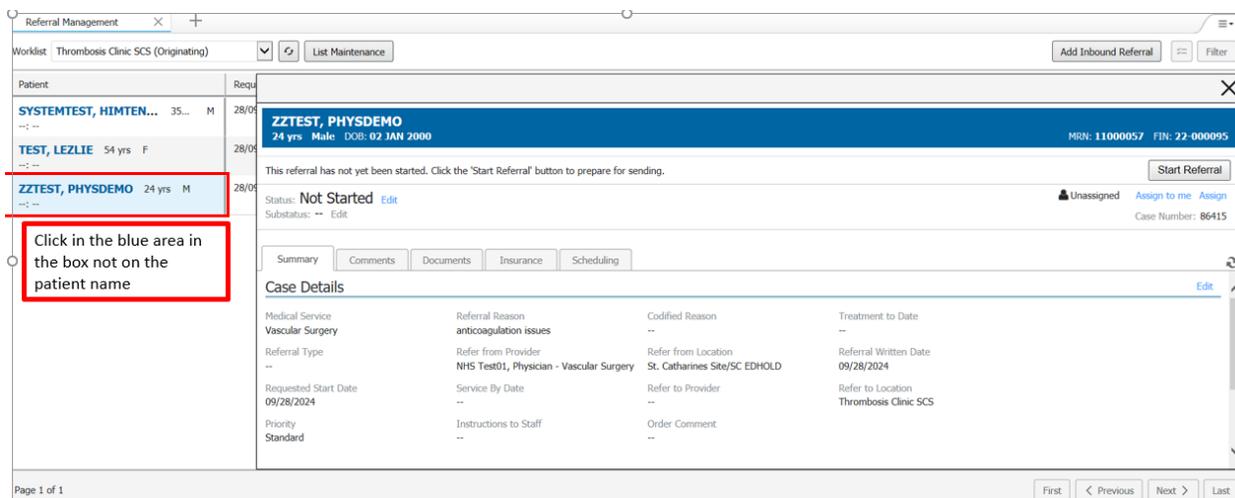
1. complete Service by looking at the drop down
2. complete Reason for Referral
3. complete refer to \*see screen shot below
4. complete urgency
5. complete other fields as appropriate



The screenshot shows the 'Details for Referral Order' form and a 'Referral Provider Lookup' window. In the main form, several fields are highlighted with red boxes: '\*Requested Start Date/Time' (07/Oct/2024, 1101 EDT), '\*Reason for Referral' (a yellow text area), '\*Service:' (Vascular Surgery dropdown), 'Urgent:' (radio buttons for Yes/No), and 'Refer to:' (a text field with a search icon). The 'Referral Provider Lookup' window shows a search for 'throm' with 'Search by: Practice' selected, and a result for 'Thrombosis Clinic SCS' is displayed. The window also includes a 'Search' button and a 'Clear' button.

1. Change search by to practice.
2. In the search field type the clinic
3. Click search and clinic on the clinic you would like to refer to.

### 2. From your Referral Originating List: Find the patient and click on the row to expand the case details. Click the start Referral Button.



Referral Management

Worklist: Thrombosis Clinic SCS (Originating) | List Maintenance | Add Inbound Referral | Filter

Patient	Req
SYSTEMTEST, HIMTEN... 35... M	28/05
TEST, LEZLIE 54 yrs F	28/05
<b>ZZTEST, PHYSDemo 24 yrs M</b>	28/05

Click in the blue area in the box not on the patient name

**ZZTEST, PHYSDemo**  
24 yrs Male DOB: 02 JAN 2000  
MRN: 11000057 FIN: 22-000095

This referral has not yet been started. Click the 'Start Referral' button to prepare for sending.

Status: **Not Started** Edit  
Substatus: -- Edit

Unassigned Assign to me Assign  
Case Number: 86415

Summary Comments Documents Insurance Scheduling

**Case Details** Edit

Medical Service	Referral Reason	Codified Reason	Treatment to Date
Vascular Surgery	anticoagulation issues	--	--
Referral Type	Refer from Provider	Refer from Location	Referral Written Date
--	NHS Test01, Physician - Vascular Surgery	St. Catharines Site/SC EDHOLD	09/28/2024
Requested Start Date	Service By Date	Refer to Provider	Refer to Location
09/28/2024	--	--	Thrombosis Clinic SCS
Priority	Instructions to Staff	Order Comment	
Standard	--	--	

Page 1 of 1 | First < Previous Next > Last

- If the provider didn't specify where to send the referral or more information is needed, on the Summary tab click "Edit" and fill in any of the missing information

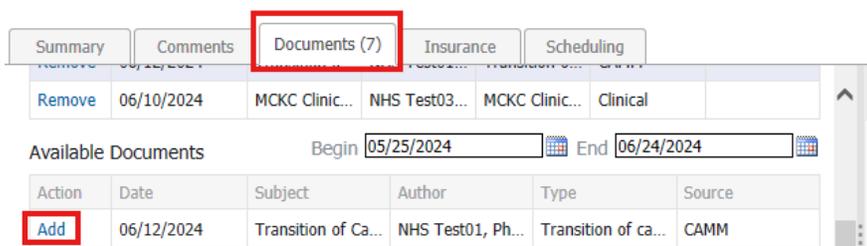


Summary Comments Documents (7) Insurance Scheduling

**Case Details** Edit

Medical Service	Referral Reason	Codified Reason	Treatment to Date	Referral Type
Orthopaedic Surgery	consult	--	--	--
Refer from Provider	Refer from Location	Referral Written Date	Requested Start Date	Service By Date
NHS Test01, Physician - Nephrology	Niagara Falls Site/NF GAC	04/19/2024	04/19/2024	--

- If there is a document that needs to be attached to the referral, find the appropriate document on the documents tab and select "Add". That will attach the document to this case, so the receiving office knows it is relevant.



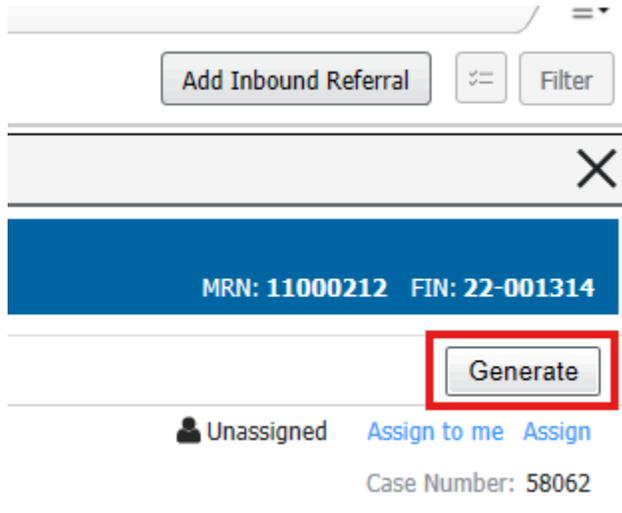
Summary Comments **Documents (7)** Insurance Scheduling

Action	Date	Subject	Author	Type	Source
Remove	06/10/2024	MCKC Clinic...	NHS Test03...	MCKC Clinic...	Clinical

Available Documents Begin: 05/25/2024 End: 06/24/2024

Action	Date	Subject	Author	Type	Source
<b>Add</b>	06/12/2024	Transition of Ca...	NHS Test01, Ph...	Transition of ca...	CAMM

- Once all the information is correct. In the upper right-hand corner click "Generate"



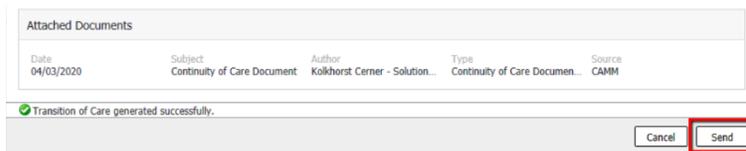
---

MRN: 11000212 FIN: 22-001314

Unassigned
 [Assign to me](#)
[Assign](#)

Case Number: 58062

6. Review the case details and click “Send”. The case is now in the receiving office’s queue



Date	Subject	Author	Type	Source
04/03/2020	Continuity of Care Document	Kolkhorst Center - Solution...	Continuity of Care Documen...	CAMM

Transition of Care generated successfully.

7. The referral will be in a “Pending” status until the receiving office accepts or rejects it