

Workflow for:

Internal Medicine **Pediatrics** **Family Medicine**

Clerical

Date Updated: 4/11/13

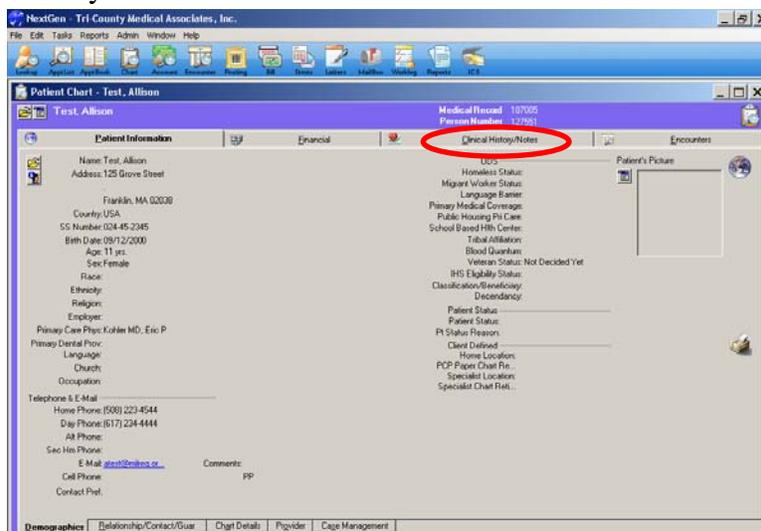
Pages: 2

NextGen: Referral Documentation Process for Primary Care Sites

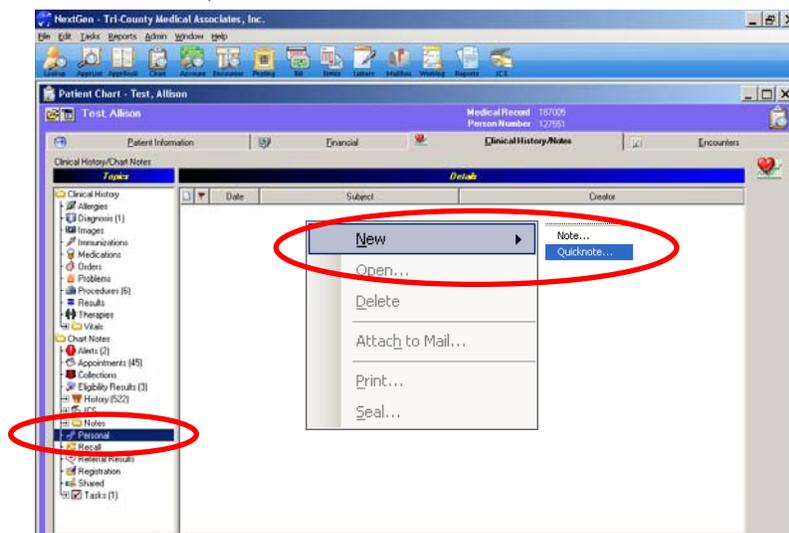
Replaces NextGen: Referral Documentation to Specialists Outside TCMA

After utilizing the appropriate Insurance Website to generate the insurance referral, open the patient chart in NextGen.

Click to view the Clinical History/Notes Tab.

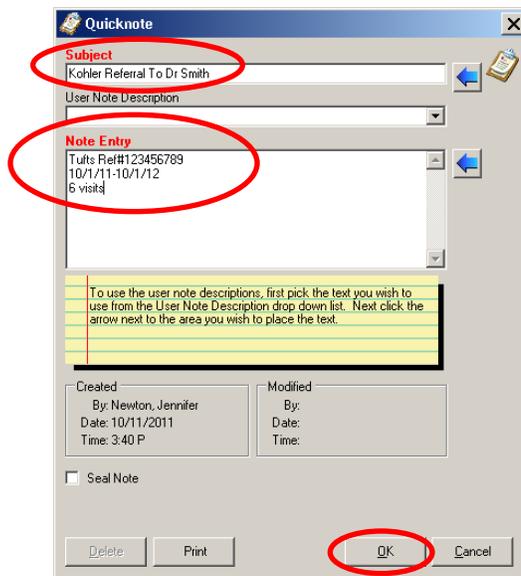


From the Menu on the left Under Notes, click Personal.



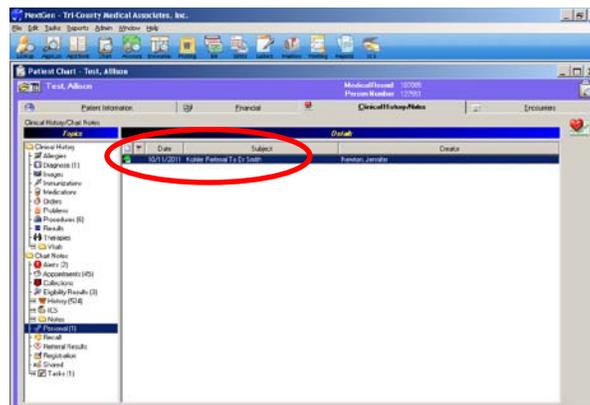
Right click anywhere in the white field, select New, then Quicknote.

Subject: Enter the PCP name “Referral to” and the name of the specialist in the Subject Field.



Note Entry: Enter the name of the Insurance and the corresponding Referral#. Enter the valid dates and the number of visits authorized, and then click OK.

You will see the Subject line in the Personal note section of the patient chart.



To see the referral details, double click on the Quicknote for it to open.

