

Referral Shell Workflow

2/6/2019

If a patient requires a referral for a visit happening outside of MRPG, a referral shell will need to be created.



Create the Referral Shell

1. Access the patient's referral screen from the patient's appointment desk, or by going to the Epic button- Referrals- Referral Entry and finding your patient.
2. On the referral screen, click **New** to enter the new referral.



Completing the Referral

1. On the General Tab, complete the following fields:

The screenshot shows the 'General' tab of the referral shell form. Key fields and their values or states are as follows:

- PCP:** TESTY, TEST [1184796]
- Service area:** (empty)
- Priority:** Routine
- Class:** (empty)
- Sensitivity:** (empty)
- Status date:** (empty)
- Type:** (empty, with a red error icon)
- Reasons:** 1
- Referred by:**
 - Override referred by and to restrictions
 - Location/POS:** (empty, with a red error icon)
 - Department:** (empty, with a red error icon)
- Referred to:**
 - Vendor:** (empty, with a yellow warning icon)
 - Department:** (empty, with a yellow warning icon)
 - Department specialty:** (empty, with a yellow warning icon)
 - Location/POS:** (empty, with a yellow warning icon)
 - Provider/POS:** (empty, with a yellow warning icon)
 - Provider specialty:** (empty, with a yellow warning icon)
- Visits:**
 - Recurring
 - Requested:** 1
 - Authorized:** 1
 - 1 of 1 Visit counts remaining:** 0 Scheduled, 0 Completed

- a) Type
 - b) Class- **Outgoing**
 - c) Referred By: Provider
 - d) Referred To: Enter Provider or Location if available- if not, proceed to step 2.and enter "Unknown Provider" in the provider field (note- the location field must be empty).
 - e) Visits Requested: Enter the number of visits you are requesting
2. On the **Notes** form, enter the following information
 - a) Choose a Note Type: Specialty Comments
 - b) Enter information in the note form for who the patient is being referred to:
 - a. Specialist Name Name
 - b. NPI
 - c. Office Telephone Number
 - d. Fax
 - e. Reason for visit (Diagnosis, Procedure)
 - f. DOS if the referral is being backdated