Referrals and E-Referrals

May 2021

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Process Overview

1. Referring provider places referral order in Epic
   - Specifies if they are requesting a consult v. advice
2. Referral appears in Referral / Auth workqueue
   - Managed by consulting department staff
3. Consulting department staff review referrals:
   - As needed, assign to consulting provider for review
   - Otherwise verify prior auth info and outreach to patient to schedule
4. Consulting provider receives assigned referrals in In-Basket
5. Consulting provider reviews referral and documents recommendation in E-Referral Response Encounter
6. Response appears in / updates Referral / Auth workqueue
   - Consulting department staff verify prior authorization info and schedule patient as needed

Referring Departments

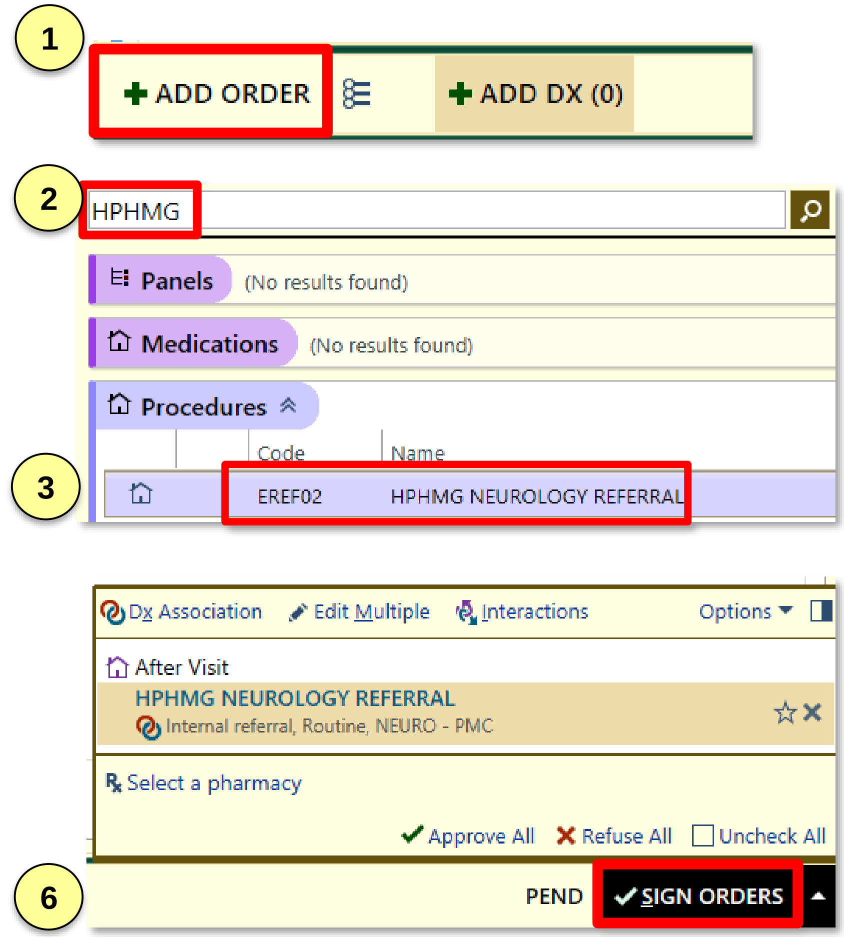
Each slide is color coded to identify intended audience:

- Referring Providers and Staff
- Referring Providers

Placing a Referral Order

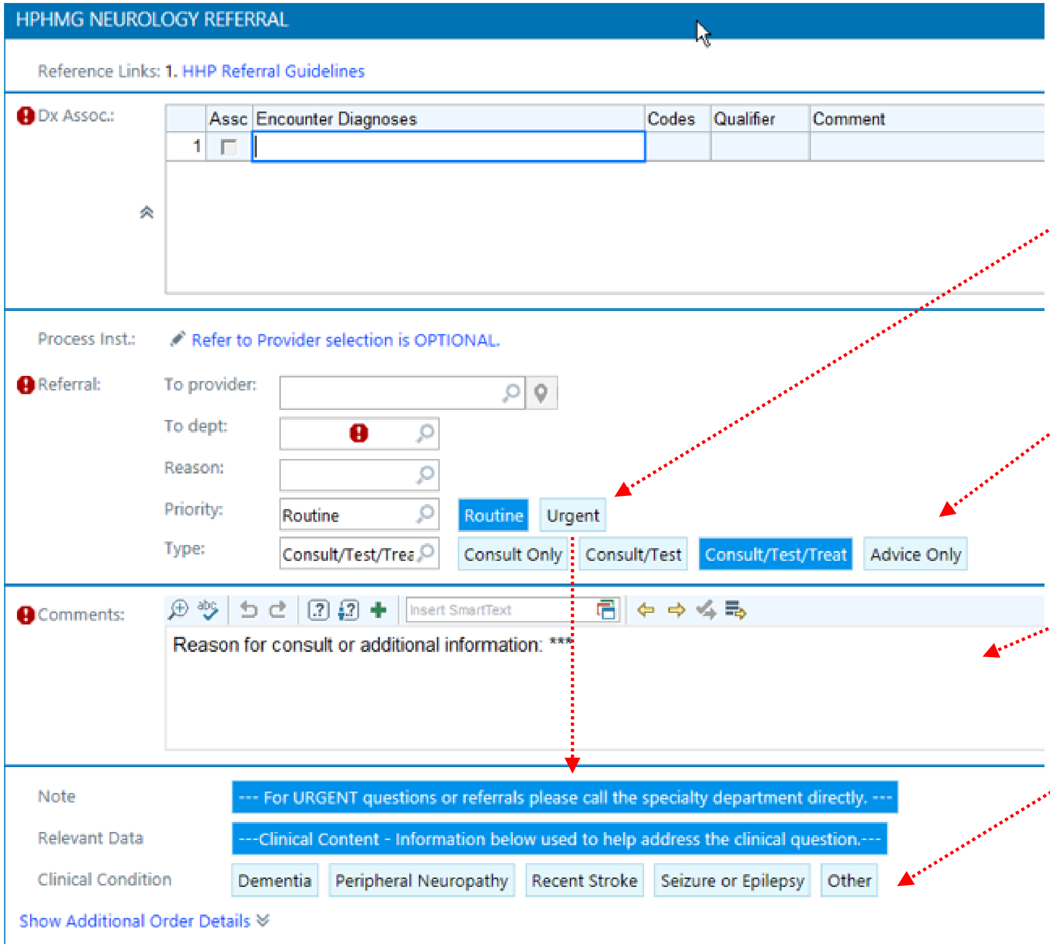
Intended Audience: Referring Providers and Clinical Staff

1. Within an encounter, click the **+Add Order** icon at the bottom of the screen
2. Click in the **Search for new orders box**, type **HPHMG** and click **Enter**
3. Double-click on the referral you'd like to select
4. Enter all pertinent information in the order
   - **To dept** and **Diagnosis** are required
   - See next slide for more information
5. Click **Accept**
6. Click **Sign Orders** then **Sign Encounter**



Placing a Referral Order

Intended Audience: Referring Providers and Clinical Staff



1. For **Urgent** referrals, please place the referral order then call the department so they can expedite scheduling the patient

2. Select the new **Advice Only** option if you'd like to request advice from a specialist prior to a consult

3. Use the **Comments** section to enter any other pertinent information

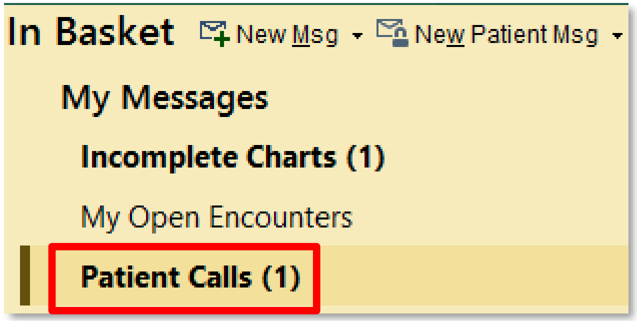
4. If applicable, select a **Clinical Condition** that relates to your patient. You'll be prompted to enter additional information that'll help the specialist provide informed advice and/or prepare for the patient's consult

Viewing Messages from the Consulting Provider

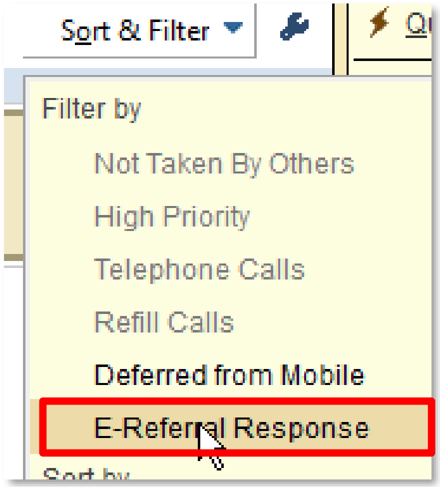
Intended Audience: Referring Providers

- Consulting providers may send messages to referring providers with inquiries about the patient and/or to communicate their recommendations

- These messages will appear in your In Basket in the **Patient Calls** folder



- To view these messages:
  - Log into **Epic** and click the **In Basket icon**
  - Click the **Patient Calls** folder
  - Click the **Sort & Filter** icon
  - Select **E-Referral Response**. This will filter your messages so you only see messages related to referrals you've placed
  - Click the messages appearing in your in basket to view them



Responding to Messages from Consulting Providers (Responses Not Part of Medical Record)

Intended Audience: Referring Providers

1. Within the in basket message, click the **Reply** button on the top right corner of the screen
2. Type your message and click the **Send** button at the bottom of the screen
3. The message will appear in the consulting provider's In Basket in the **Patient Calls** folder
4. These in basket responses will not be permanently saved in the patient's chart but will be viewable up to 365 days after being sent (timeframe subject to change in the future)

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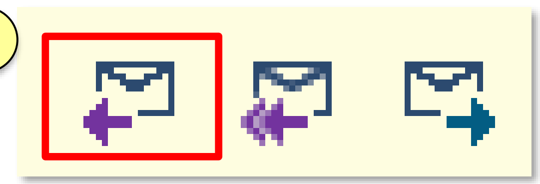

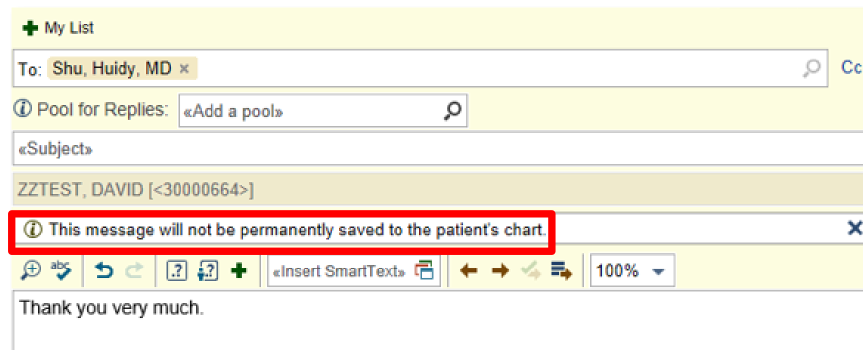

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Responding to Messages from Consulting Providers (Responses Part of Medical Record)

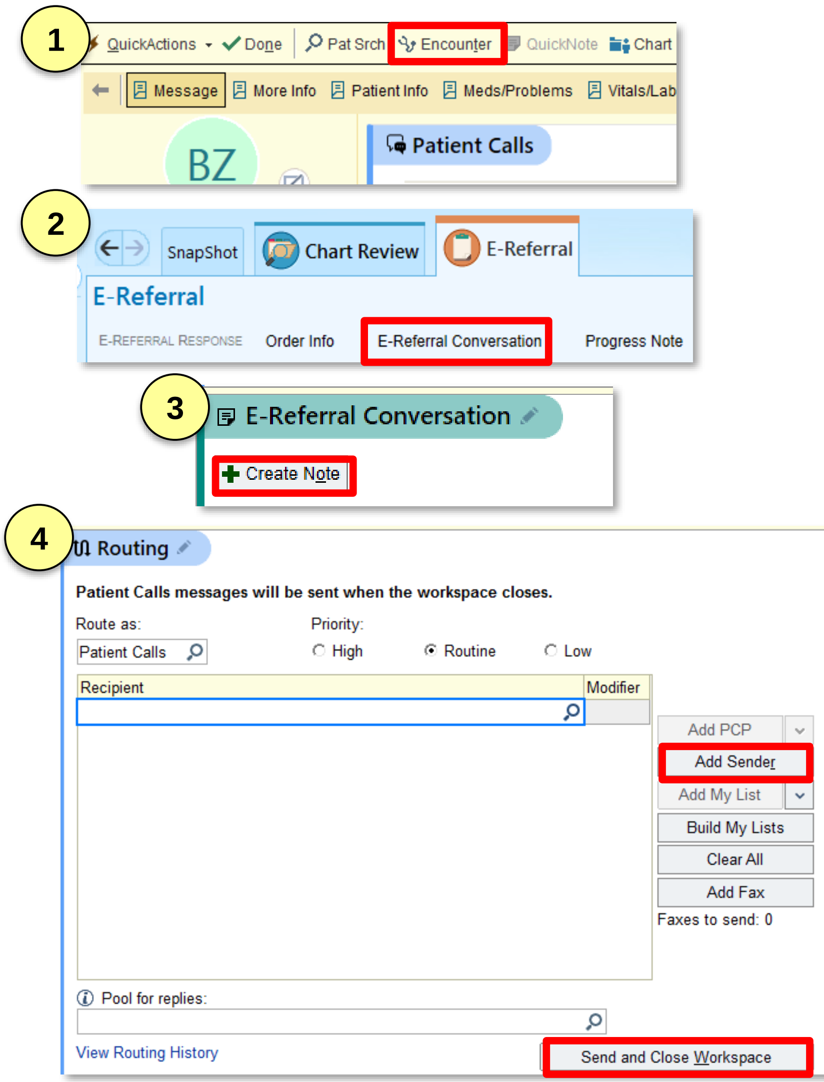
Intended Audience: Referring Providers

1. In the in basket message, click the **Encounter** button on the top of the screen. This will open the E-Referral Response Encounter created by the consulting provider and you'll be able to add a response directly into the encounter

2. Click the **E-Referral Conversation** button at the top of the screen

3. Under the E-Referral Conversation section, click **+Create Note**, type a message and click **Accept** at the bottom

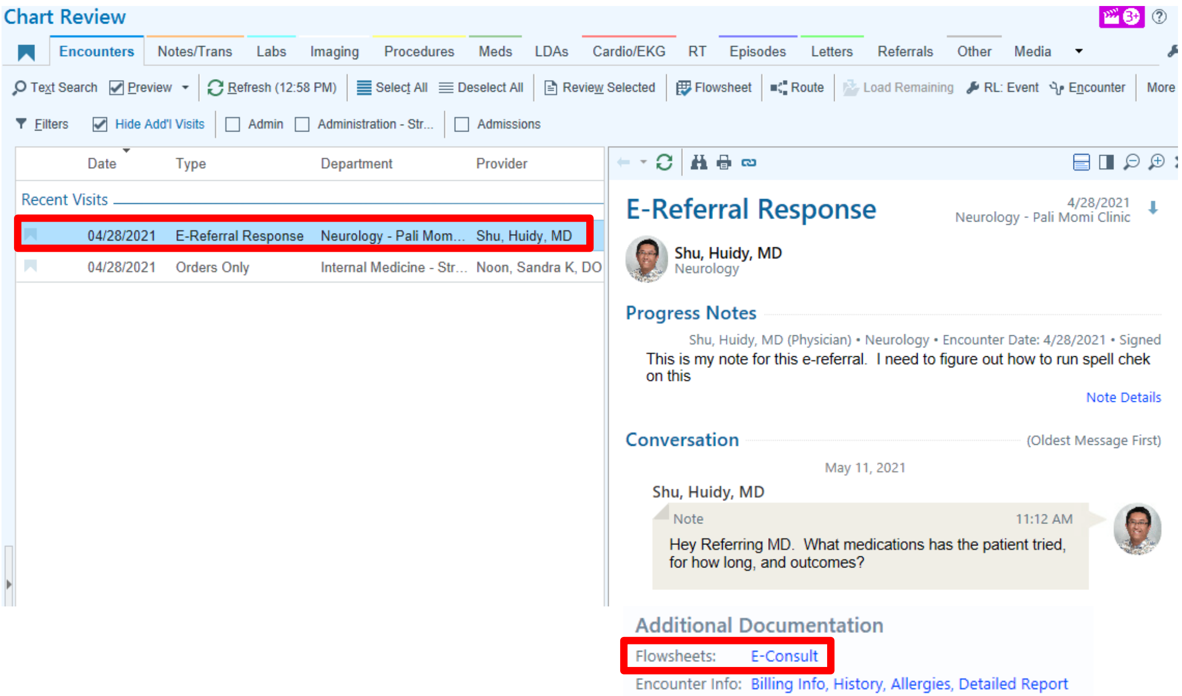
4. Scroll down to the **Routing** section.
   - Click the **Add Sender** button then click **Send and Close Workspace.**
   - Add Sender adds the name of the consulting provider who originally send the message to you
   - The message will appear in the consulting provider's In Basket in the **Patient Calls** folder



Reviewing E-Referral Response Encounters

Intended Audience: Referring Providers and Staff

- E-Referral Response Encounters are viewable in the **Chart Review** tab for a patient
- Click the **E-Consult** link under **Additional Documentation** to see the documented time spent on the encounter

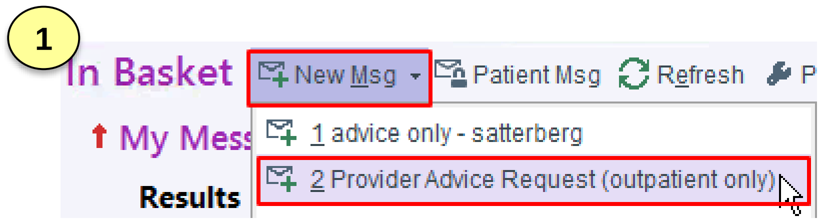


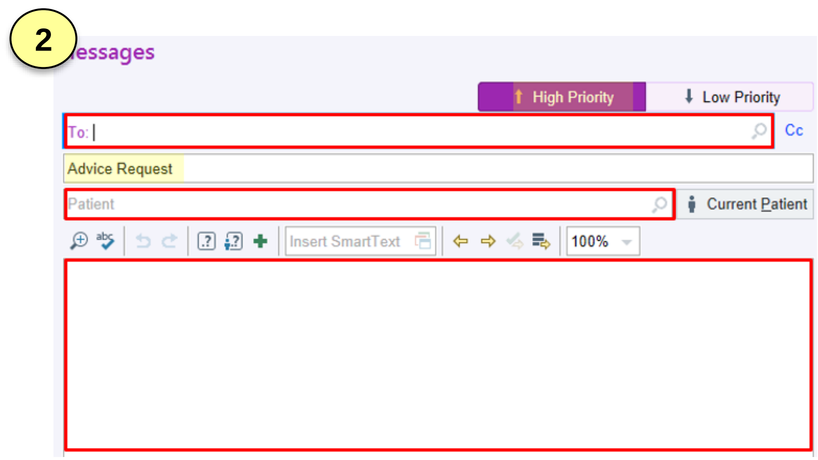
Referrals for Specialties NOT Using the Redesigned E-Referral Orders

Intended Audience: Referring Providers and Clinical Staff

To refer to specialties not using the new Referral / E-Referral process, please continue to use the specialty's existing referral orders in Epic. To request advice from such areas, please continue to send an Epic In-Basket Message to the appropriate HPHMG Specialty Pool or HHP Provider.

1. In your Epic In Basket, click **New Msg** > **Provider Advice Request (outpatient only)**
2. This will create a new message automatically defaulted to High priority.
   - **To field**: type the name of the HPHMG Specialty Pool / HHP Provider you'd like to direct the message to (see next slide for specialties / provider providing advice in this manner)
   - **Patient field**: type in the name / MRN of the patient in question
   - Type your message in the main area
3. Click **Send**



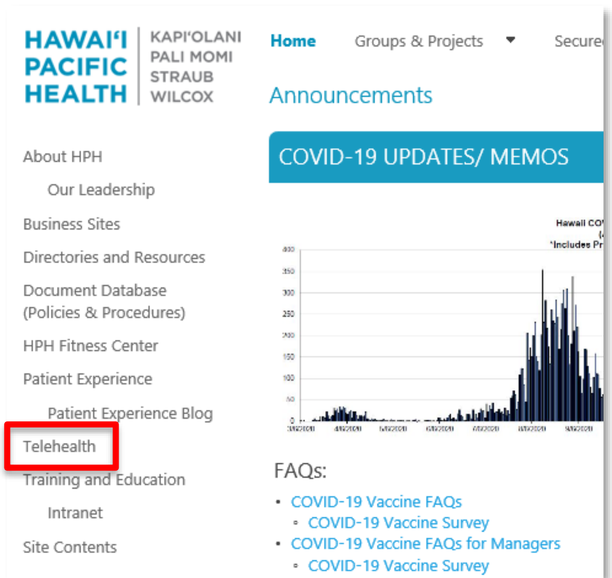


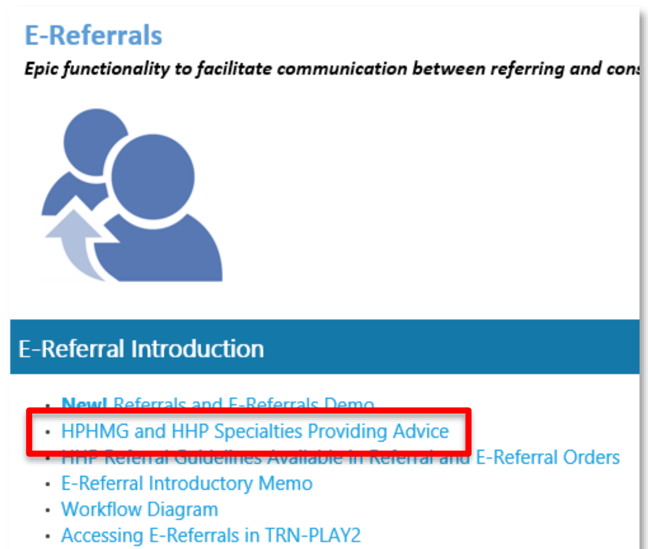
Specialties Providing Advice

Intended Audience: Referring Providers and Clinical Staff

To view an up-to-date list of specialties and providers providing advice and how to request it, please visit the HPH Telehealth Intranet site

1. Click **E-Referrals** on the Home Page
2. Locate the **E-Referral Introduction** section
3. Click the **HPHMG and HHP Specialties Providing Advice** link





Consulting Departments

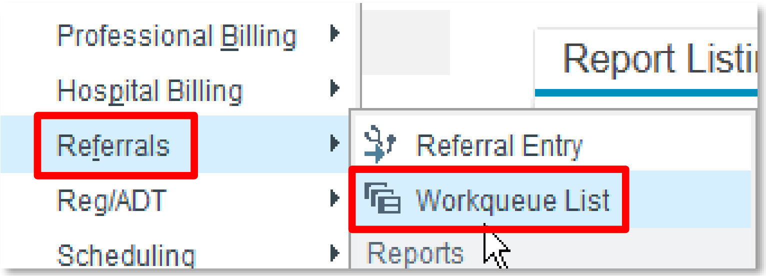
Each slide is color coded to identify intended audience:

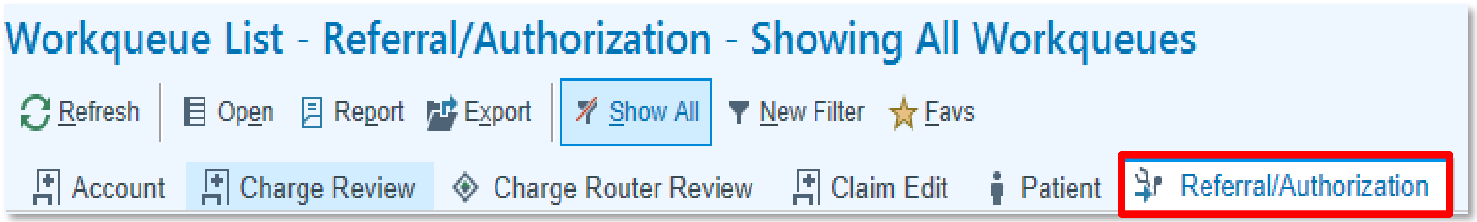
- Consulting Providers and Staff
- Consulting Providers
- Consulting Department Staff

Accessing Your Referral / Authorization Workqueue

Intended Audience: Consulting Department Staff

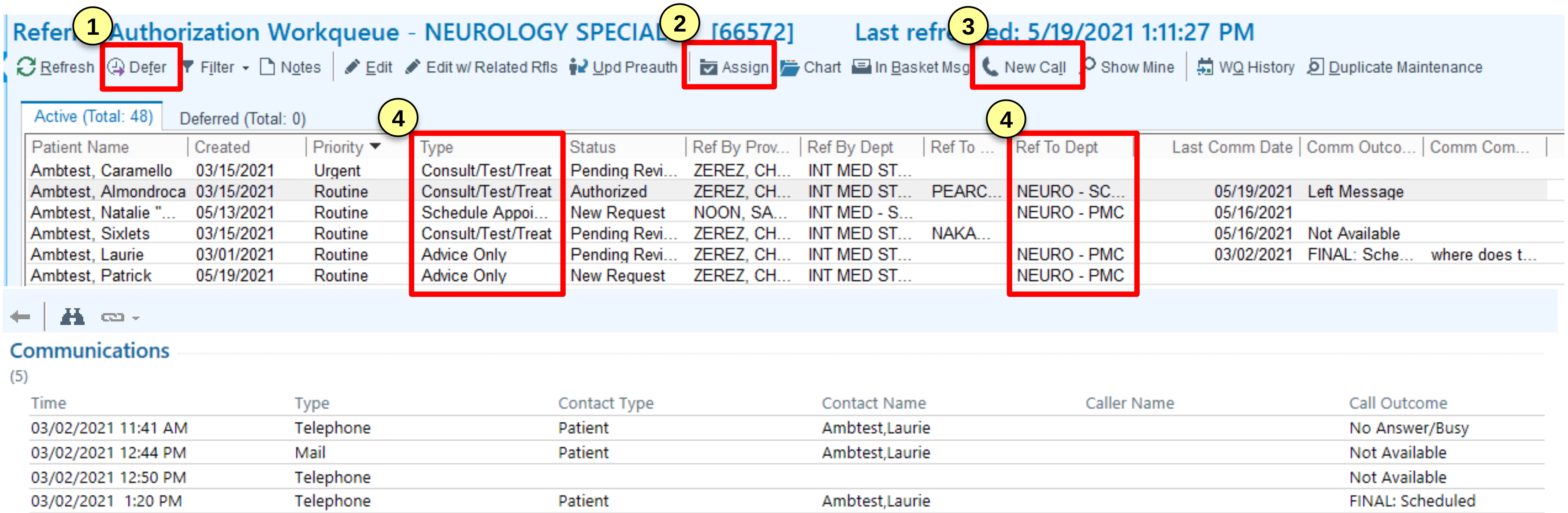
1. Sign into Epic
2. Click the **Epic button** on the top left corner of the screen
3. Click **Referrals** > **Workqueue List**
4. Click the **Referral / Authorization** tab
5. Double-click the name of your department's workqueue





Navigating Your Referral / Authorization Workqueue

Intended Audience: Consulting Department Staff



1 **Defer:** moves the referral to the Deferred tab to be addressed at a later date. Referrals can be deferred until a specific date / period of time. Click the Activate button at the top of Deferred tab to move the referral back to the Active tab.

2 **Assign:** schedule an appointment.
1. Click the Assign button
2. Click the **Make Appt** button on the next screen

3 **New Call:** document incoming and outgoing communications. Information entered will appear in the columns below and in the Communication section for the referral:
- Last Comm Date
- Comm Outcome
- Comm Comments

4 **Type and Ref to Dep:** set by the referring provider when they originally place the referral order. Click the column label to automatically sort the workqueue by the column's values

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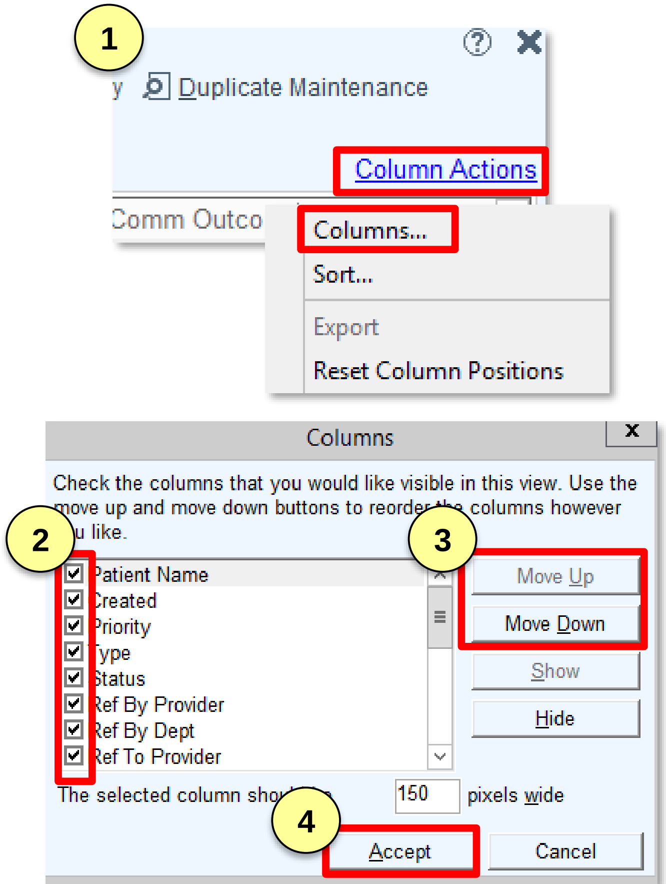
Customizing Your Referral / Authorization Workqueue

Intended Audience: Consulting Department Staff

You can customize the columns / fields that appear in your workqueue:

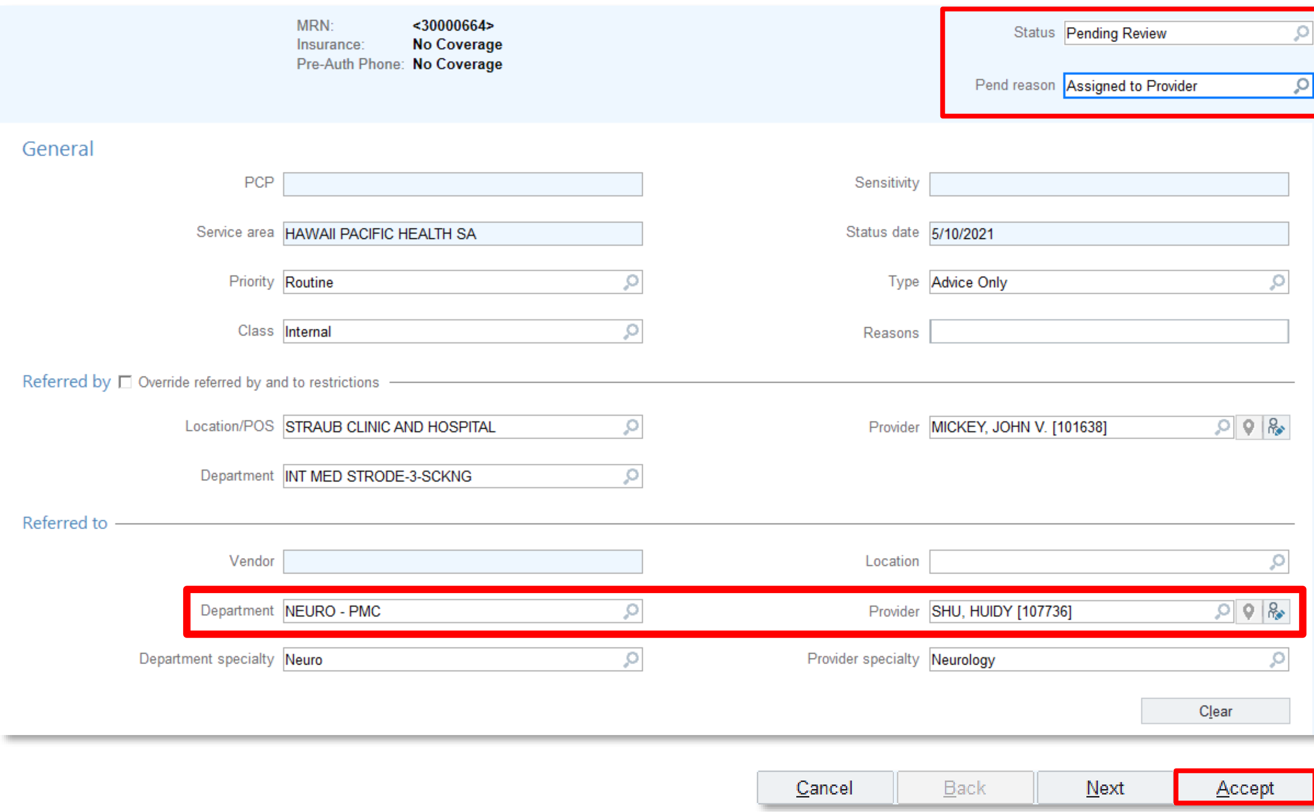
1. Click **Column Actions** on the right of the screen and click **Columns**
2. In the Columns box, use the **checkbox** next to the name of the column to display / hide them
3. You can also move a column's position as they appear in the workqueue by using the **Move Up / Move Down** buttons
4. When complete click **Accept**



Assigning Referrals for Review

Intended Audience: Consulting Department Staff

1 Double-click an order within your workqueue



2 Update the fields below:

Status = Pending Review

Pend Reason = Assigned to Provider

3 Ensure Referred to **Department** and **Provider** are populated

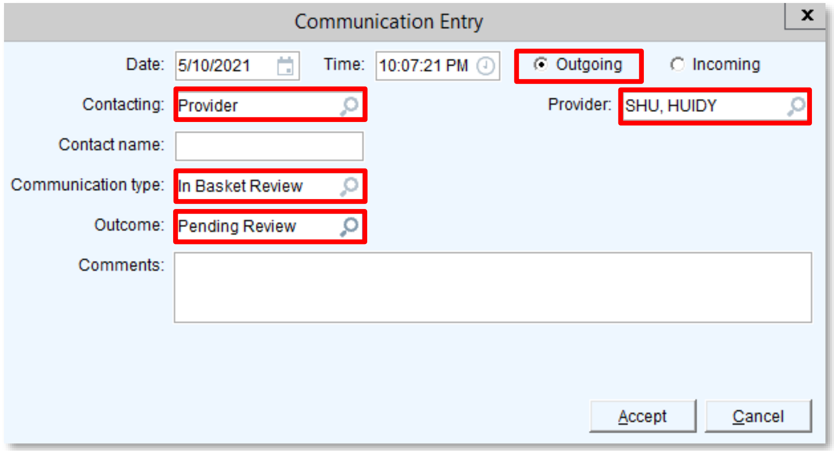
4 Click **Accept**

Assigning Referrals for Review

Intended Audience: Consulting Department Staff

You can also update the referral in your Referral / Authorization workqueue so others know it's been assigned to a provider for review

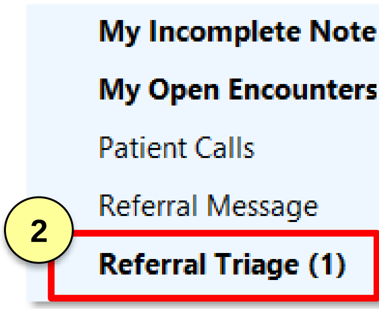
1. Go to your **Referral / Authorization Workqueue**
2. Click on the assigned referral
3. Click **New Call** at the top of the screen
4. Update the **Communication Entry** box similar to below and click **Accept**
5. Info entered in this box will appear in the columns below in the workqueue:
   - Last Comm Date
   - Comm Outcome
   - Comm Comments

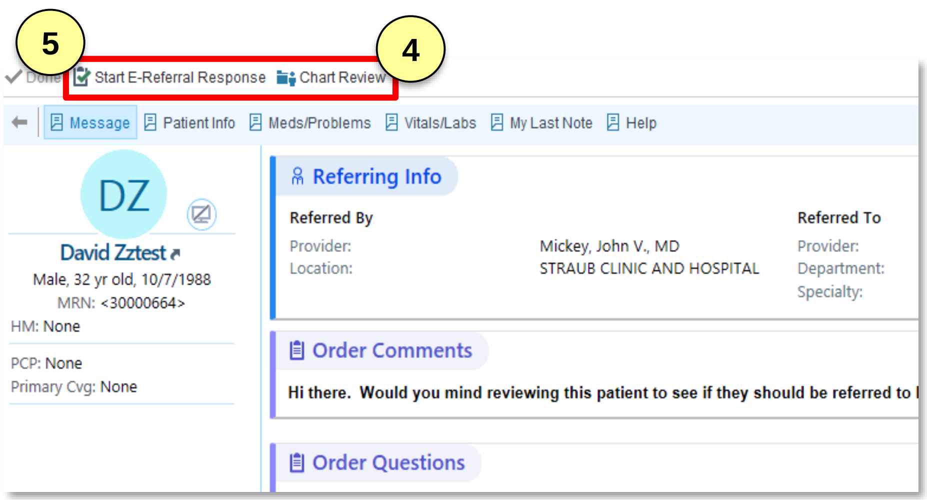


Reviewing Assigned Referrals

Intended Audience: Consulting Providers

1. Log into Epic and click the **In Basket** icon
2. Click **Referral Triage** folder on the left side bar
3. Click the a message to review the order's details on the right side of the screen
4. Click the **Chart Review** button at the top of the screen to review the patient's chart
5. Click the **Start E-Referral Response** button to document your response and recommendation. This will create an encounter that can be viewed in the patient's chart

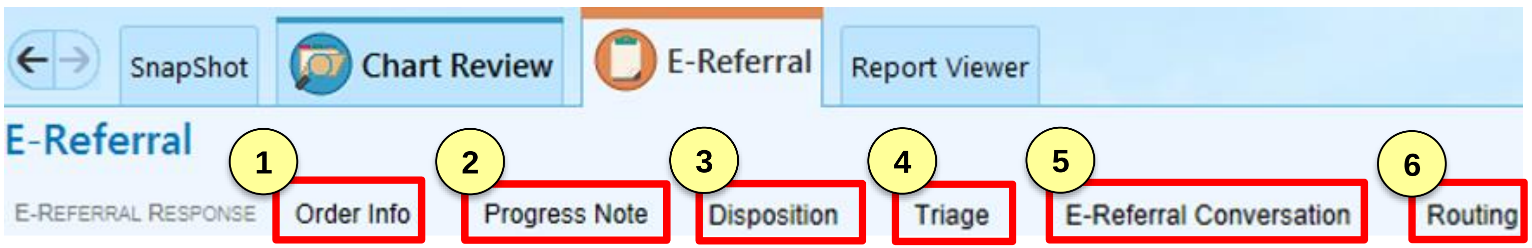




Responding to Assigned Referrals with an E-Referral Response Encounter

Intended Audience: Consulting Providers

- Click the Navigator options at the top of the screen to document your response
- Descriptions of each section are below and on the next few slides
- When complete, click **Sign Encounter** on the bottom right corner of the screen



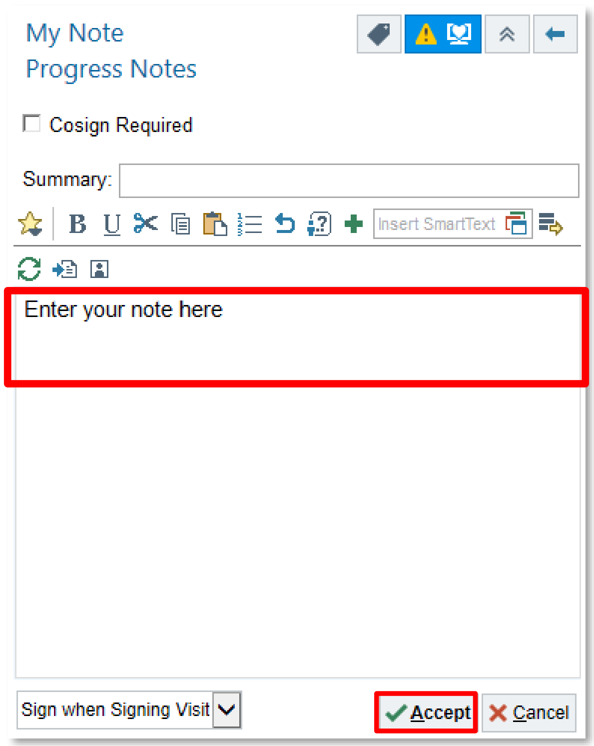
1. **Order Info** – review details about the original referral
2. **Progress Note** – type a note documenting your recommendation
3. **Disposition** – document the time / minutes spent reviewing the referral
4. **Triage** – select your recommendation
   i.e. schedule a consult, advice is sufficient, consult with another specialty
5. **E-Referral Conversation** – type a note to the referring provider
   i.e. question or notification of recommendation
6. **Routing** – send your E-Referral Conversation to a provider / recipient

Progress Note and Disposition

Intended Audience: Consulting Providers

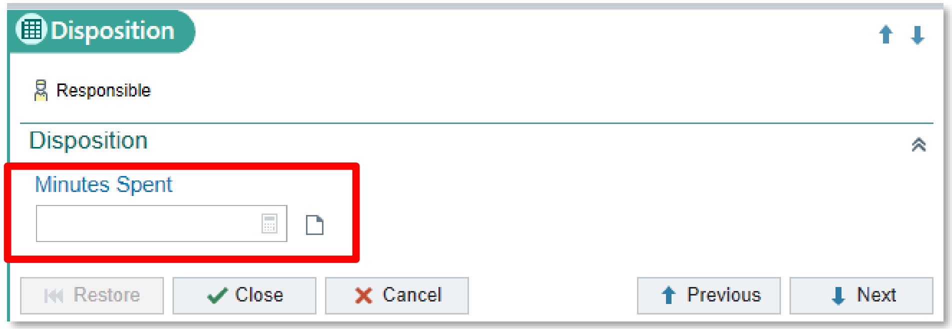
Progress Note

Type a note then click Accept



Disposition

Enter the minutes spent reviewing the referral



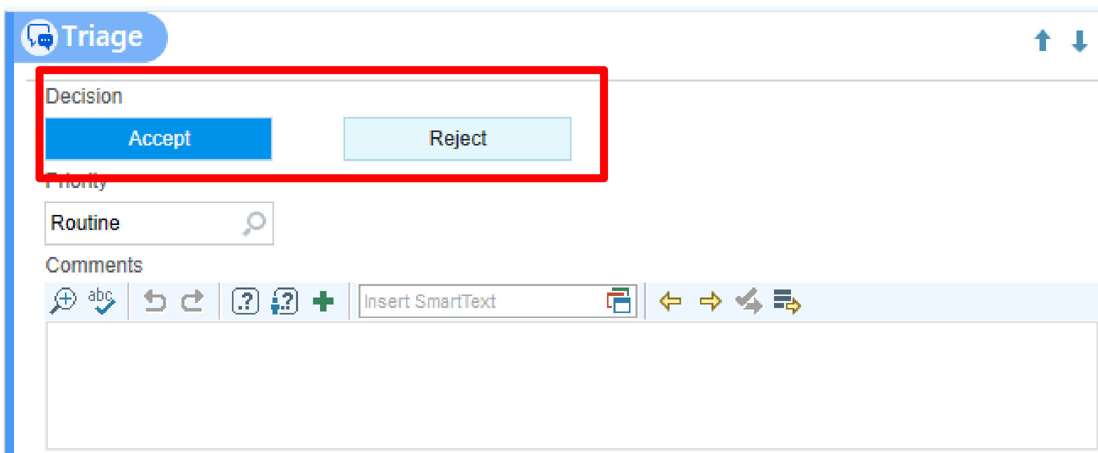
Triage / Recommendation

Intended Audience: Consulting Providers

Triage

To document recommendations:

- **Accept** - Consultant recommends patient be seen by that specialty for consult (either in office, via phone or video)
- **Reject** - Consultant advises patient does not need to be seen by specialty for a consult or should be evaluated by another specialty



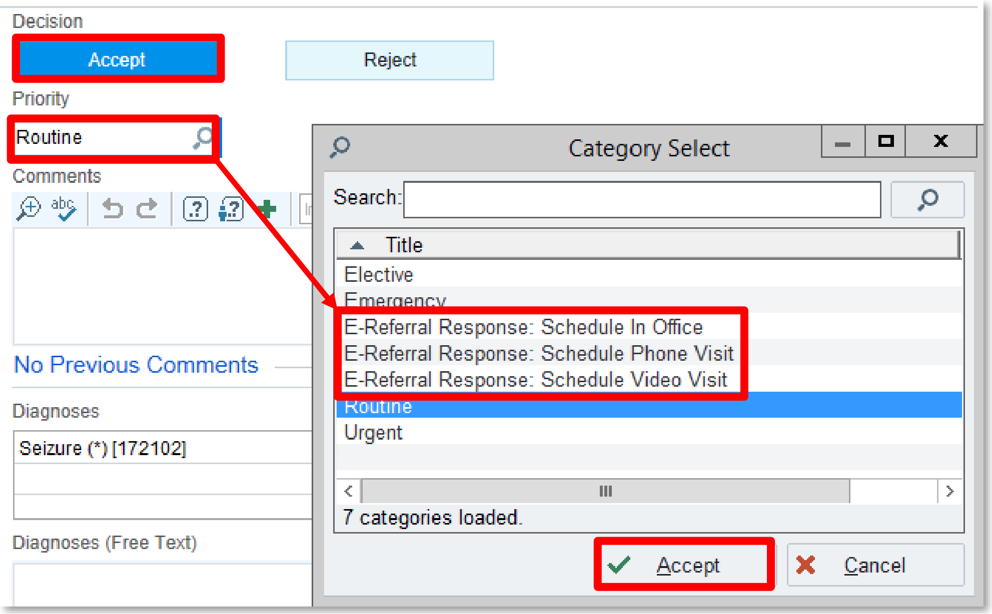
Triage / Recommendation - Accept

Intended Audience: Consulting Providers

Triage - Accept

Consultant recommends patient be seen by that specialty for consult (either in office, via phone or video)

1. Click the **Accept** button
2. Click the magnifying glass icon in the **Priority** box
3. Select any of the three **E-Referral Responses**. This information will be sent to your staff to schedule the patient accordingly
4. Click **Accept**
5. Type any **Comments** as appropriate



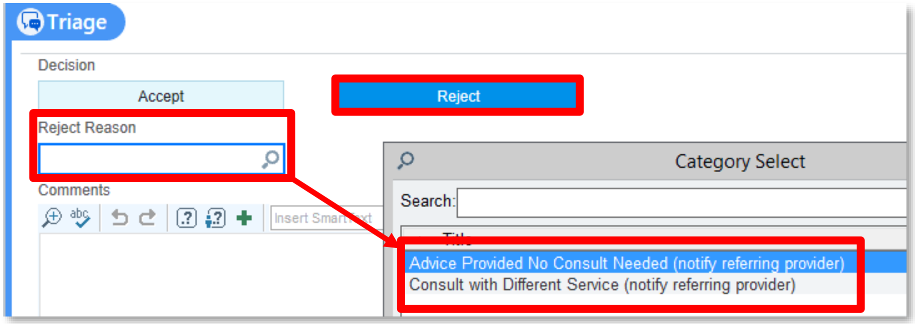
Triage / Recommendation - Reject

Intended Audience: Consulting Providers

Triage - Reject

Consultant advises patient does not need to be seen by specialty for a consult or should be evaluated by another specialty

1. Click the **Reject** button
2. Click the magnifying glass icon in the **Reject Reason** box
3. Select a reason
4. Click **Accept**
5. Type any **Comments** as appropriate
6. Notify the referring provider using the E-Referral Conversation and Routing sections (next slides)

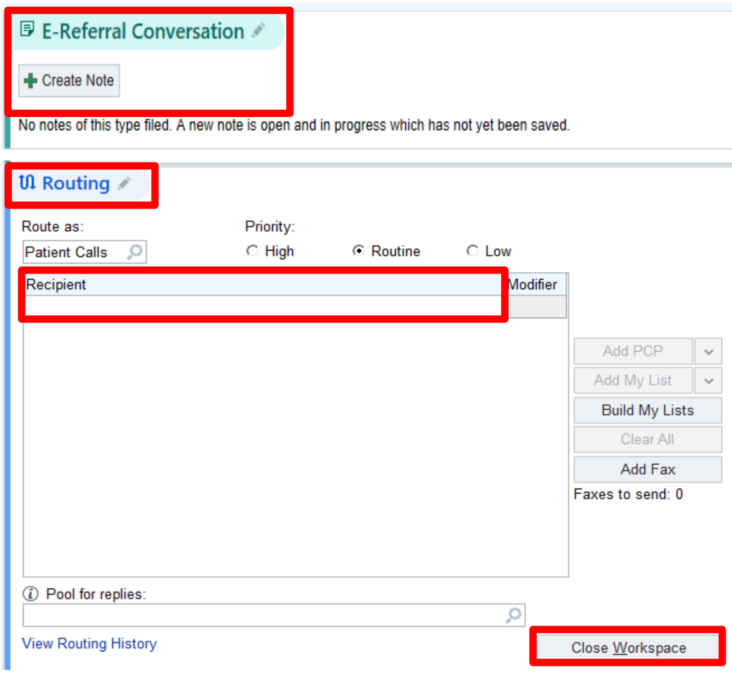


E-Referral Conversation and Routing

Intended Audience: Consulting Providers

E-Referral Conversation and Routing

- To send a message to the referring provider.
- This can take the form a question to clarify the nature of the referral or to notify them about your final recommendation



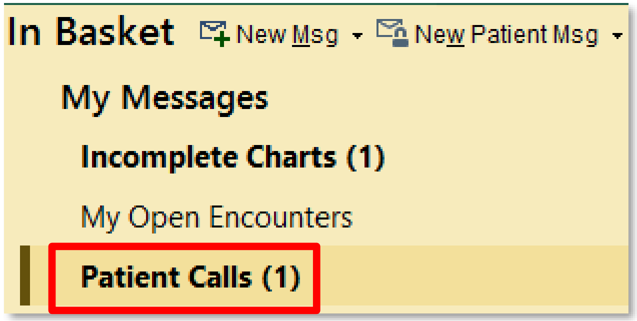
1. Click **Create Note** in the E-Referral Conversation section
2. Type note on the screen that appears to the right and click Accept at the bottom of the screen
3. In the **Routing Section**, click the box below **Recipient**
4. Type the name of the individual you'd like to send the message to
5. Click **Close Workspace**
6. The message will appear in their **In Basket** in the **Patient Calls** folder

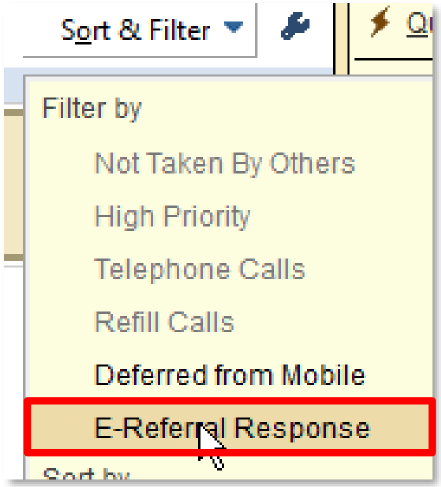
Responses from the Referring Provider

Intended Audience: Consulting Providers

- Referring providers may reply to messages from the consulting provider These messages will appear in your In Basket in the Patient Calls folder

- To view these messages:
  - Log into **Epic** and click the **In Basket icon**
  - Click the **Patient Calls** folder
  - Click the **Sort & Filter** icon
  - Select **E-Referral Response**. This will filter your messages so you only see messages related to referrals you've placed
  - Click the messages appearing in your in basket to view them





Scheduling Appointments from the Workqueue

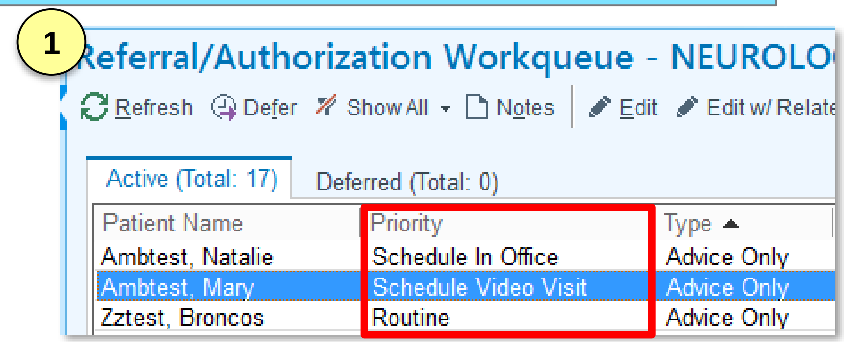
Intended Audience: Consulting Department Staff

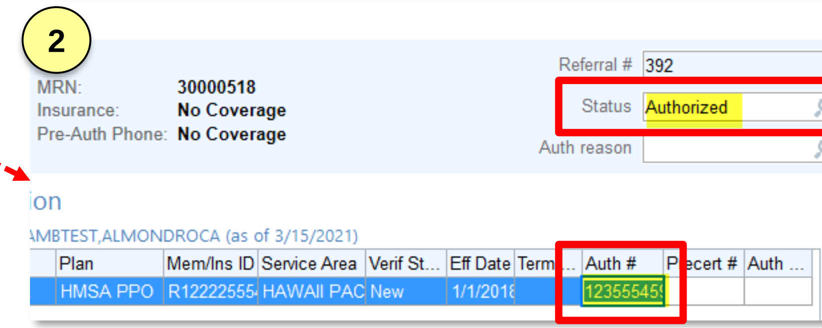
If the consulting provider selects **Accept**:

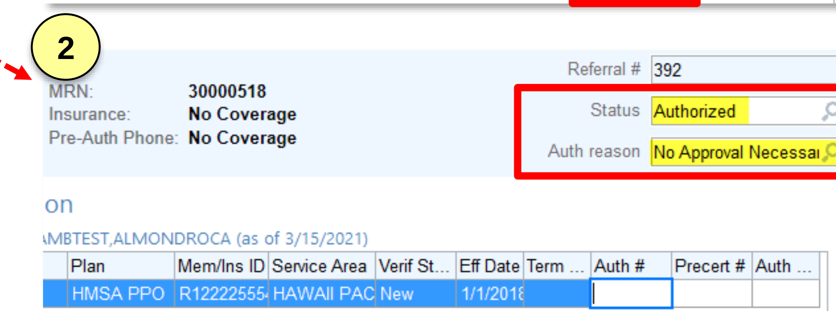
1. The recommendation will appear in the **Priority** field in the workqueue (i.e. Schedule In Office)

2. Double-click the referral in the workqueue to update any prior authorization information
   - Click **Authorization** on the left of the screen
   - If a prior auth is required
     - Update **Status** to **Authorized**
     - Enter the auth number in the **Auth #** field
   - If a prior auth is not required:
     - Update **Status** to **Authorized**
     - Update **Auth Reason** to **No Approval Necessary**
     - Leave the Auth # field blank

3. Use the **New Call** and **Assign** buttons to document outreach and schedule appts accordingly
4. Referral will be removed from the workqueue at the end of the day if Status = Authorized and appt is scheduled







Scheduling Appointments from the Workqueue

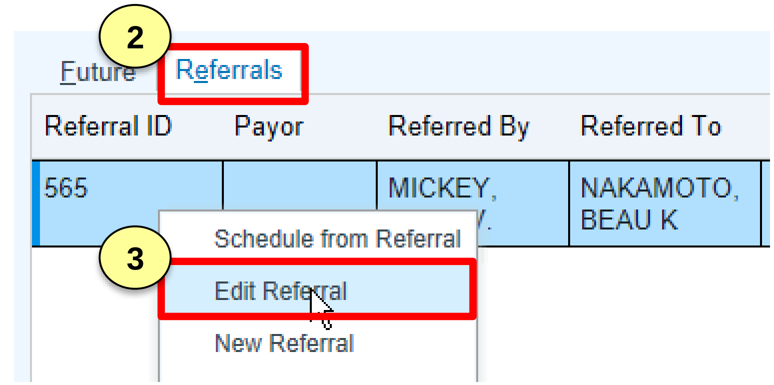
Intended Audience: Consulting Department Staff

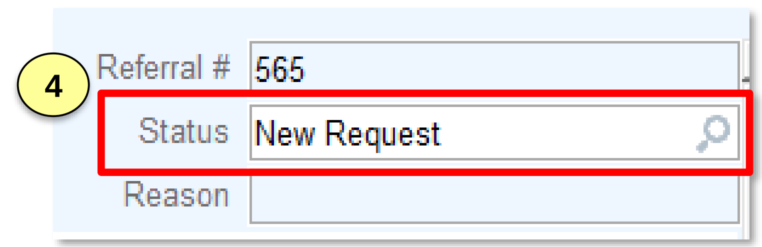
If consulting provider selects **Reject**:

- The referral will automatically be removed from the workqueue

To add a referral back to the workqueue:

1. Click the **Appts** button and search for the patient
2. Click the **Referrals** tab
3. Right-click the referral and select **Edit Referral**
4. Change the **Status** to **New Request**



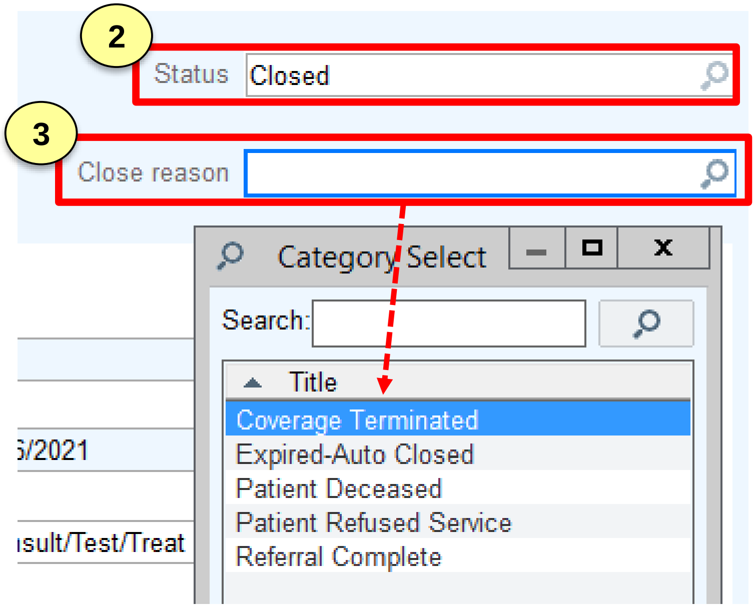


Removing Referrals from the Workqueue

Intended Audience: Consulting Department Staff

You are also able to manually remove referrals from your workqueue (i.e. patient refuses to be scheduled, referral needs to be cancelled)

1. Double-click a referral in your workqueue
2. Update **Status** to **Closed**
3. Click the magnifying glass icon next to the **Close reason** box and select a reason
4. Click **Accept**



Reviewing E-Referral Response Encounters

Intended Audience: Consulting Providers and Staff

- E-Referral Response Encounters are viewable in the **Chart Review** tab for a patient
- Click the **E-Consult** link under **Additional Documentation** to see the documented time spent on the encounter