

Referrals and E-Referrals

May 2021

**HAWAI'I
PACIFIC
HEALTH**



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PALI MOMI
STRAUB
WILCOX

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**

The screenshot illustrates the steps for placing a referral order in an EHR system. It is divided into six numbered sections:

- 1:** The '+ ADD ORDER' button is highlighted with a red box.
- 2:** The search box contains 'HPHMG' and is highlighted with a red box.
- 3:** The search results table shows a row for 'HPHMG NEUROLOGY REFERRAL' with code 'EREF02', highlighted with a red box.
- 4:** The order details form is shown, including fields for 'After Visit', 'Internal referral, Routine, NEURO - PMC', and 'Select a pharmacy'. The 'Approve All' button is highlighted with a red box.
- 5:** The 'SIGN ORDERS' button is highlighted with a red box.
- 6:** The status 'PEND' and the 'SIGN ORDERS' button are visible at the bottom of the screen.

Placing a Referral Order

Intended Audience: Referring Providers and Clinical Staff

HPHMG NEUROLOGY REFERRAL

Reference Links: 1. HHP Referral Guidelines

Dx Assoc.:

Assc	Encounter	Diagnoses	Codes	Qualifier	Comment
1	<input type="checkbox"/>				

Process Inst.: Refer to Provider selection is OPTIONAL.

Referral:

To provider:

To dept:

Reason:

Priority:

Type:

Comments:

Reason for consult or additional information: ***

Note: --- For URGENT questions or referrals please call the specialty department directly. ---

Relevant Data: ---Clinical Content - Information below used to help address the clinical question.---

Clinical Condition:

Show Additional Order Details

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

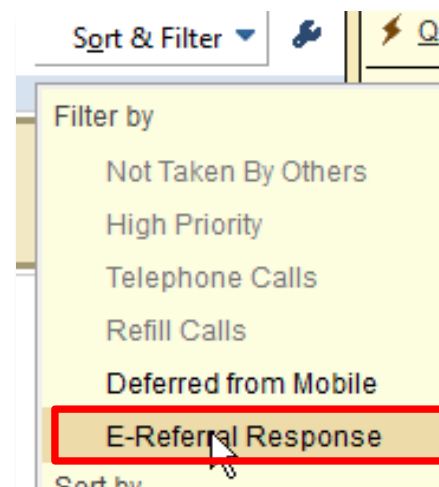
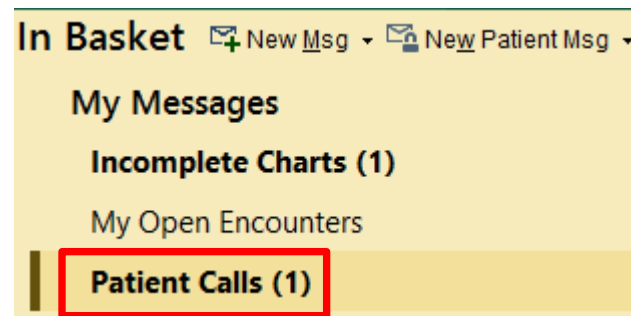
4

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

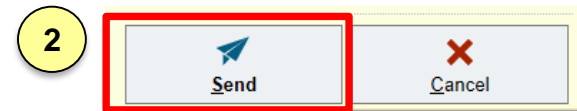
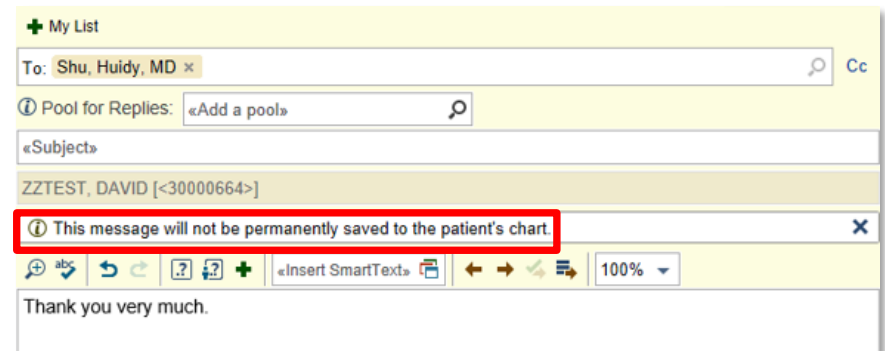
- Consulting providers may send messages to referring providers with inquiries about the patient and/or to communicate their recommendations
- These messages will appear in your In Basket in the **Patient Calls** folder
- To view these messages:
 - Log into **Epic** and click the **In Basket icon**
 - 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

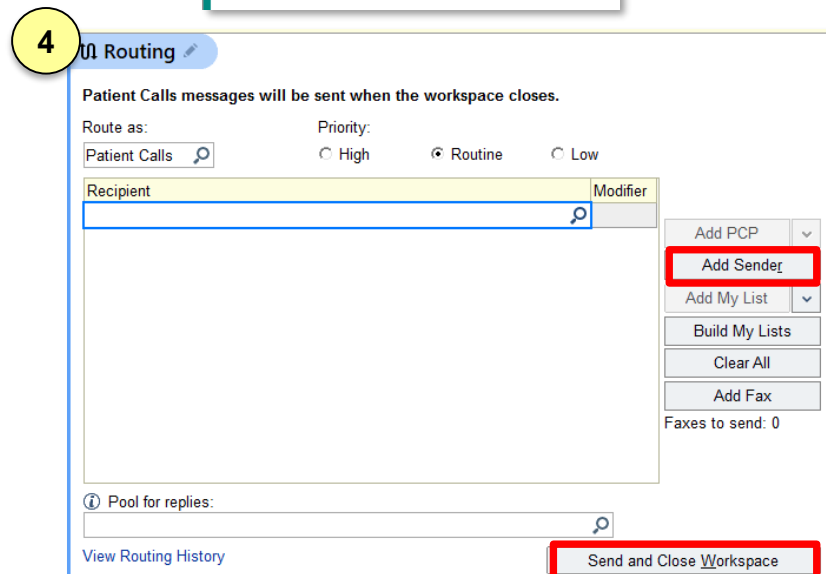
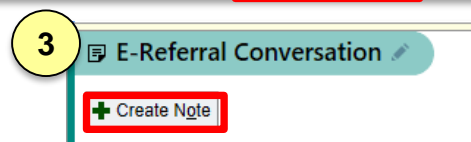
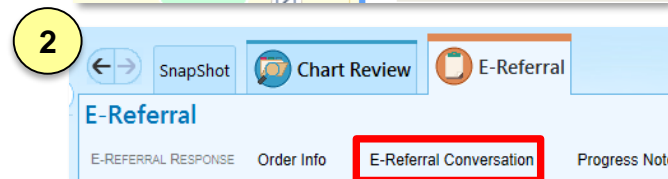
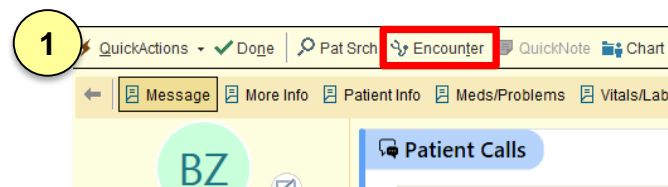
1. Within the in basket message, click the **Reply** button on the top right corner of the screen
2. Type your message and click the **Send** button at the bottom of the screen
3. The message will appear in the consulting provider's In Basket in the **Patient Calls** folder
4. These in basket responses 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)



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

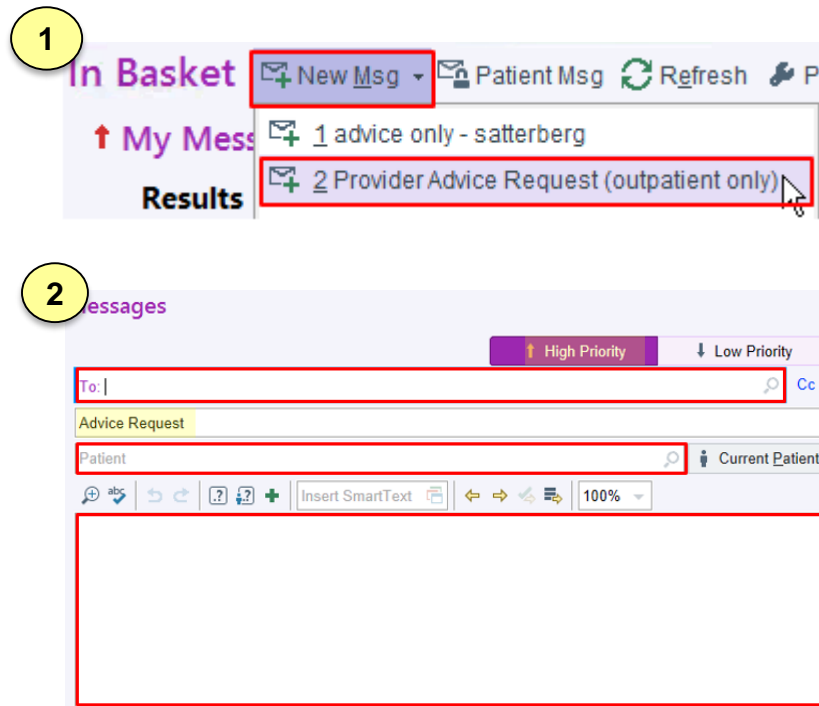
The screenshot displays the 'Chart Review' interface. At the top, there are tabs for 'Encounters', 'Notes/Trans', 'Labs', 'Imaging', 'Procedures', 'Meds', 'LDAs', 'Cardio/EKG', 'RT', 'Episodes', 'Letters', 'Referrals', 'Other', and 'Media'. Below these tabs is a search bar and various utility buttons like 'Refresh', 'Select All', and 'Review Selected'. A table of 'Recent Visits' is shown, with the first row highlighted in red: '04/28/2021 E-Referral Response Neurology - Pali Mom... Shu, Huidy, MD'. To the right of the table, the 'E-Referral Response' details are shown for 'Shu, Huidy, MD' on '4/28/2021'. The 'Progress Notes' section contains a note from 'Shu, Huidy, MD (Physician) • Neurology • Encounter Date: 4/28/2021 • Signed' stating: 'This is my note for this e-referral. I need to figure out how to run spell check on this'. Below this is a 'Conversation' section with a message from 'Shu, Huidy, MD' dated 'May 11, 2021' at '11:12 AM' asking: 'Hey Referring MD. What medications has the patient tried, for how long, and outcomes?'. At the bottom, the 'Additional Documentation' section has a red box around the 'E-Consult' link under 'Flowsheets:'. Other links include 'Billing Info', 'History', 'Allergies', and 'Detailed Report'.

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

HAWAI'I PACIFIC HEALTH | KAPI'OLANI PALI MOMI STRAUB WILCOX

Home Groups & Projects Secure

Announcements

COVID-19 UPDATES/ MEMOS

300
250
200
150
100
50
0

3/20/20 4/20/20 5/20/20 6/20/20 7/20/20 8/20/20 9/20/20

Hawaii CO
Includes Pr

FAQs:

- COVID-19 Vaccine FAQs
 - COVID-19 Vaccine Survey
- COVID-19 Vaccine FAQs for Managers
 - COVID-19 Vaccine Survey

Navigation menu items: About HPH, Our Leadership, Business Sites, Directories and Resources, Document Database (Policies & Procedures), HPH Fitness Center, Patient Experience, Patient Experience Blog, **Telehealth**, Training and Education, Intranet, Site Contents




E-Referrals
Epic functionality to facilitate communication between referring and consulting providers

E-Referral Introduction

- **New Referrals and E-Referrals Demo**
- **HPHMG and HHP Specialties Providing Advice**
- HHP Referral Guidelines Available in Referral and E-Referral Orders
- E-Referral Introductory Memo
- Workflow Diagram
- Accessing E-Referrals in TRN-PLAY2

Consulting Departments

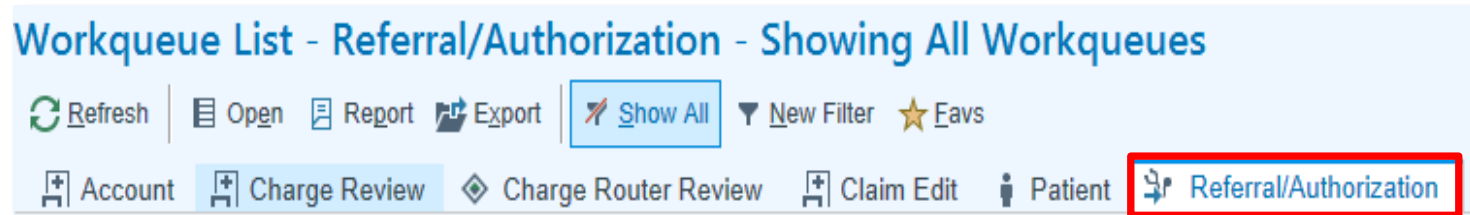
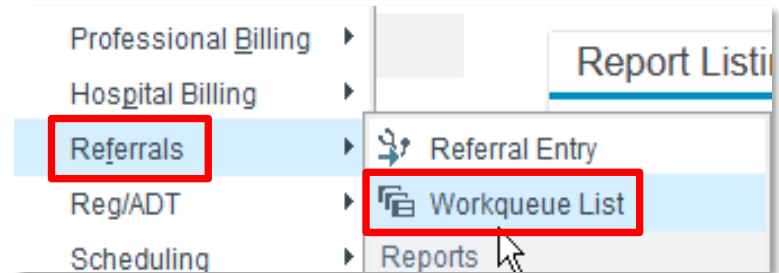
Each slide is color coded to identify intended audience:

-  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

Referral **1** Authorization Workqueue - NEUROLOGY SPECIAL **2** [66572] Last referred: **3** 5/19/2021 1:11:27 PM

Refresh Defer Filter Notes Edit Edit w/ Related Rfls Upd Preauth Assign Chart In Basket Msg New Call Show Mine WQ History Duplicate Maintenance

Active (Total: 48) Deferred (Total: 0) **4**

Patient Name	Created	Priority	Type	Status	Ref By Prov...	Ref By Dept	Ref To ...	Ref To Dept	Last Comm Date	Comm Outco...	Comm Com...
Ambtest, Caramello	03/15/2021	Urgent	Consult/Test/Treat	Pending Revi...	ZEREZ, CH...	INT MED ST...					
Ambtest, Almondroca	03/15/2021	Routine	Consult/Test/Treat	Authorized	ZEREZ, CH...	INT MED ST...	PEARC...	NEURO - SC...	05/19/2021	Left Message	
Ambtest, Natalie "...	05/13/2021	Routine	Schedule Appoi...	New Request	NOON, SA...	INT MED - S...		NEURO - PMC	05/16/2021		
Ambtest, Sixlets	03/15/2021	Routine	Consult/Test/Treat	Pending Revi...	ZEREZ, CH...	INT MED ST...	NAKA...		05/16/2021	Not Available	
Ambtest, Laurie	03/01/2021	Routine	Advice Only	Pending Revi...	ZEREZ, CH...	INT MED ST...		NEURO - PMC	03/02/2021	FINAL: Sche...	where does t...
Ambtest, Patrick	05/19/2021	Routine	Advice Only	New Request	ZEREZ, CH...	INT MED ST...		NEURO - PMC			

← 🏠 📞

Communications

(5)

Time	Type	Contact Type	Contact Name	Caller Name	Call Outcome
03/02/2021 11:41 AM	Telephone	Patient	Ambtest,Laurie		No Answer/Busy
03/02/2021 12:44 PM	Mail	Patient	Ambtest,Laurie		Not Available
03/02/2021 12:50 PM	Telephone				Not Available
03/02/2021 1:20 PM	Telephone	Patient	Ambtest,Laurie		FINAL: Scheduled

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

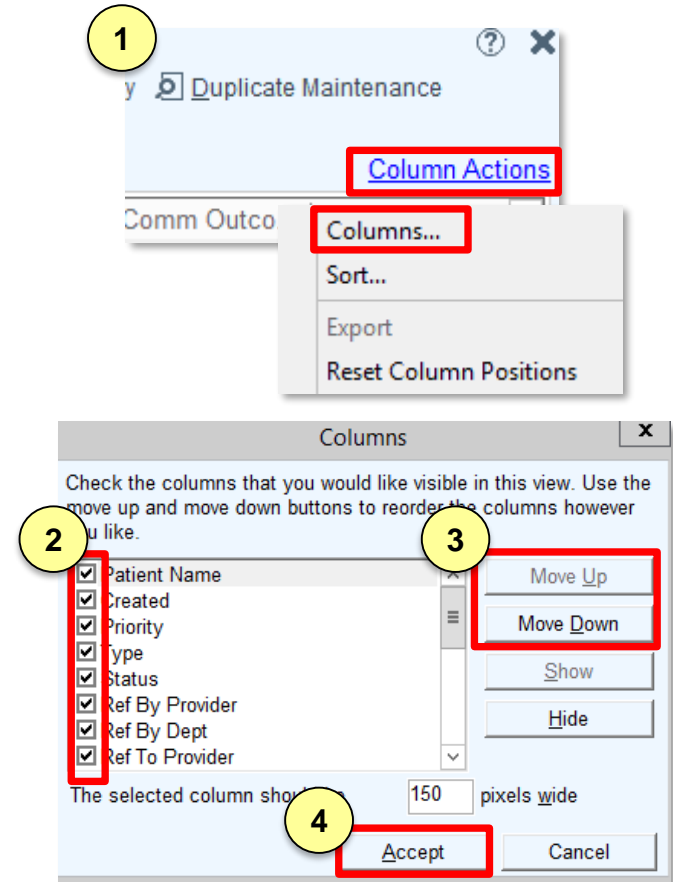
4 Type and Ref to Dep: set by the referring provider when they originally place the referral order. Click the column label to automatically sort the workqueue by the column's values

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

MRN: <30000664>
Insurance: No Coverage
Pre-Auth Phone: No Coverage

Status: Pending Review
Pend reason: Assigned to Provider

General

PCP:
Sensitivity:
Service area: HAWAII PACIFIC HEALTH SA
Status date: 5/10/2021
Priority: Routine
Type: Advice Only
Class: Internal
Reasons:

Referred by Override referred by and to restrictions

Location/POS: STRAUB CLINIC AND HOSPITAL
Provider: MICKEY, JOHN V. [101638]
Department: INT MED STRODE-3-SCKNG

Referred to

Vendor:
Location:
Department: NEURO - PMC
Provider: SHU, HUIDY [107736]
Department specialty: Neuro
Provider specialty: Neurology

Clear

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**

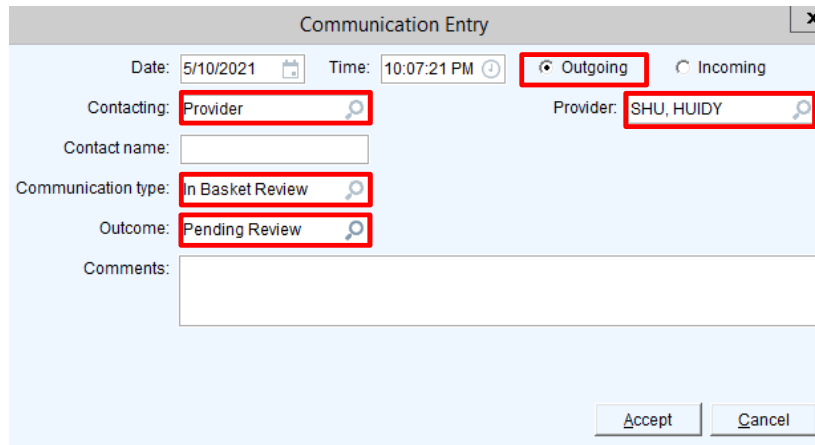
Cancel Back Next Accept

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



The screenshot shows a 'Communication Entry' form with the following fields and values:

- Date: 5/10/2021
- Time: 10:07:21 PM
- Direction: Outgoing (highlighted with a red box), Incoming
- Contacting: Provider (highlighted with a red box)
- Provider: SHU, HUIDY (highlighted with a red box)
- Contact name: (empty)
- Communication type: In Basket Review (highlighted with a red box)
- Outcome: Pending Review (highlighted with a red box)
- Comments: (empty)

Buttons: Accept, Cancel

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

My Incomplete Note

My Open Encounters

Patient Calls

Referral Message

Referral Triage (1)

5 Start E-Referral Response Chart Review 4

Message Patient Info Meds/Problems Vitals/Labs My Last Note Help

DZ
David Zztest
Male, 32 yr old, 10/7/1988
MRN: <30000664>
HM: None
PCP: None
Primary Cvg: None

Referring Info

Referred By		Referred To
Provider:	Mickey, John V., MD	Provider:
Location:	STRAUB CLINIC AND HOSPITAL	Department:
		Specialty:

Order Comments

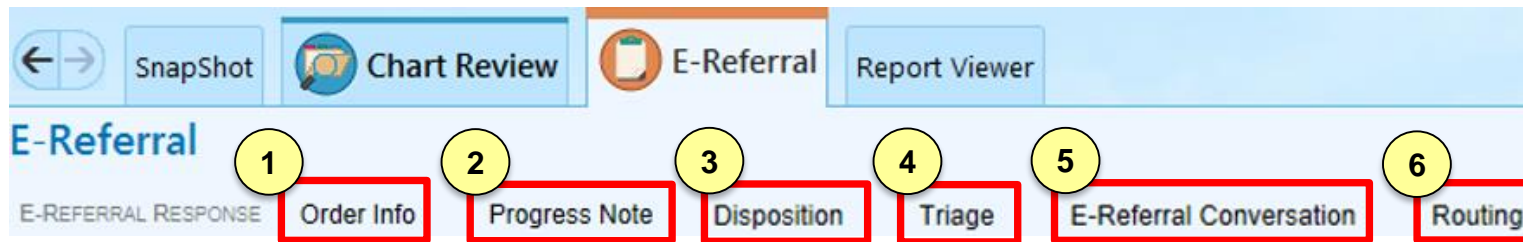
Hi there. Would you mind reviewing this patient to see if they should be referred to...

Order Questions

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



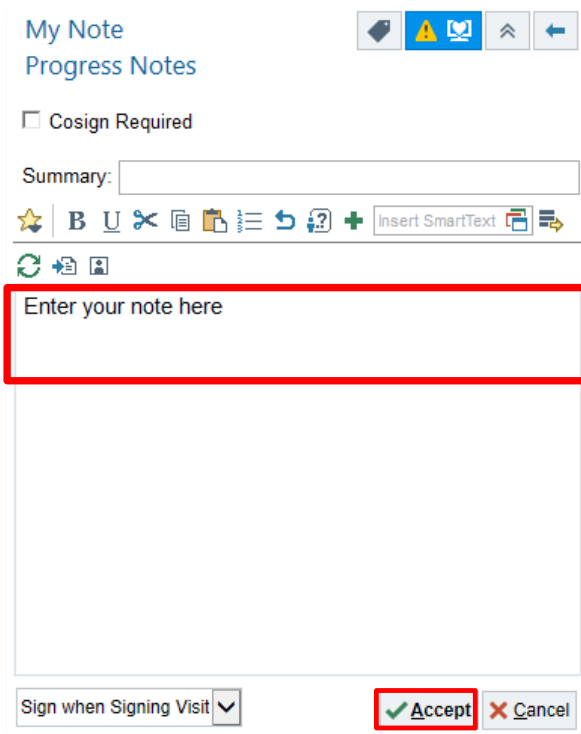
- 1 **Order Info** – review details about the original referral
- 2 **Progress Note** – type a note documenting your recommendation
- 3 **Disposition** – document the time / minutes spent reviewing the referral
- 4 **Triage** – select your recommendation
i.e. schedule a consult, advice is sufficient, 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

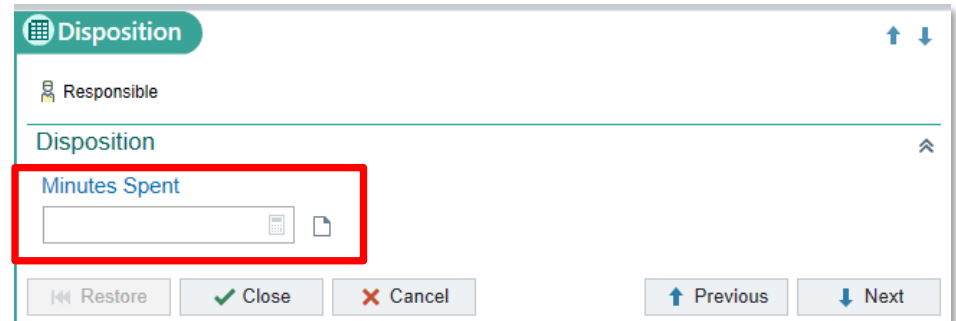
Type a note then click Accept



The screenshot shows the 'Progress Note' form. At the top, it says 'My Note' and 'Progress Notes'. There are icons for undo, warning, print, up, and left. Below that is a checkbox for 'Cosign Required'. A 'Summary:' field is present. A rich text editor toolbar includes a star, bold, underline, strikethrough, copy, paste, list, undo, redo, help, insert smart text, and print. Below the toolbar is a large text area with the placeholder 'Enter your note here', which is highlighted with a red box. At the bottom, there is a 'Sign when Signing Visit' dropdown and 'Accept' and 'Cancel' buttons, with the 'Accept' button highlighted in red.

Disposition

Enter the minutes spent reviewing the referral



The screenshot shows the 'Disposition' form. It has a title bar with 'Disposition' and up/down arrows. Below the title bar is a 'Responsible' field with a person icon. A 'Disposition' field with an up arrow is also present. The 'Minutes Spent' field is highlighted with a red box and contains a calendar icon and a document icon. At the bottom, there are buttons for 'Restore', 'Close', 'Cancel', 'Previous', and 'Next'.

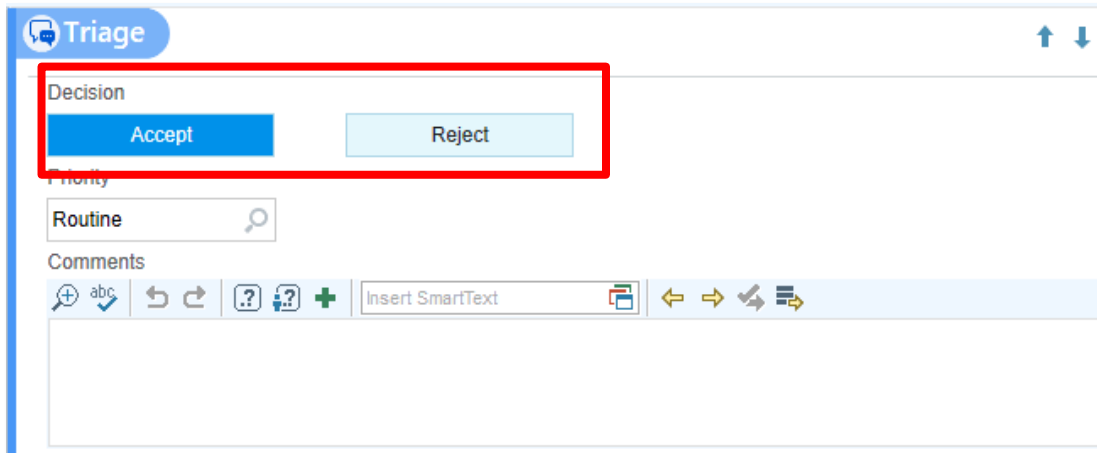
Triage / Recommendation

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



The screenshot shows a software interface for triage. At the top left, there is a blue header with a speech bubble icon and the word "Triage". Below this, there is a "Decision" section with two buttons: "Accept" (blue) and "Reject" (light blue). These two buttons are enclosed in a red rectangular box. Below the "Decision" section, there is a "Priority" section with a dropdown menu currently set to "Routine". Below that is a "Comments" section with a rich text editor toolbar containing icons for undo, redo, bold, italic, link, unlink, and a plus sign. The toolbar also includes a text input field with the placeholder "Insert SmartText" and a small icon of a document with a checkmark. Below the toolbar is a large empty text area for entering comments.

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

The screenshot displays a software interface for triage. At the top, there are two buttons: 'Accept' (highlighted in red) and 'Reject'. Below these is a 'Priority' dropdown menu with 'Routine' selected (also highlighted in red). A magnifying glass icon is visible next to the dropdown. To the right, a 'Category Select' dialog box is open, showing a search bar and a list of categories: 'Elective', 'Emergency', 'E-Referral Response: Schedule In Office', 'E-Referral Response: Schedule Phone Visit', 'E-Referral Response: Schedule Video Visit', 'Routine' (highlighted in blue), and 'Urgent'. A red box highlights the three E-Referral Response options. At the bottom of the dialog, there are 'Accept' (with a green checkmark) and 'Cancel' (with a red X) buttons, both highlighted in red. The main interface also shows a 'Comments' section with a text area and a 'Diagnoses' section with a text input containing 'Seizure (*) [172102]'.

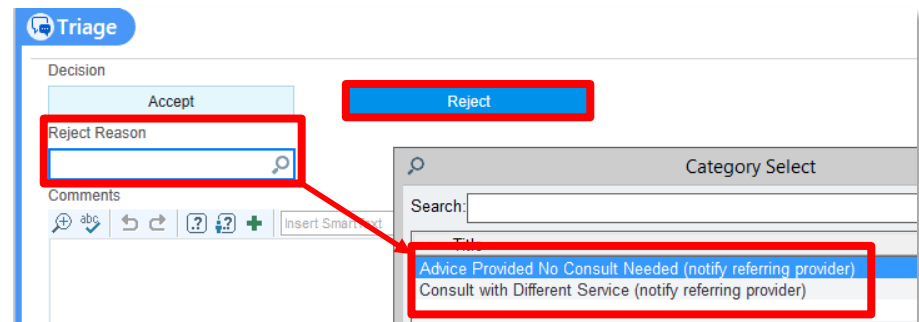
Triage / Recommendation - Reject

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

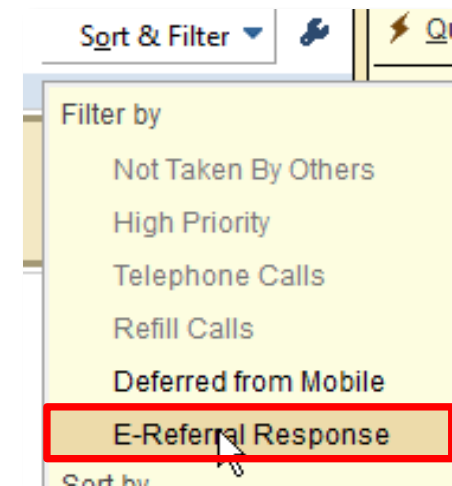
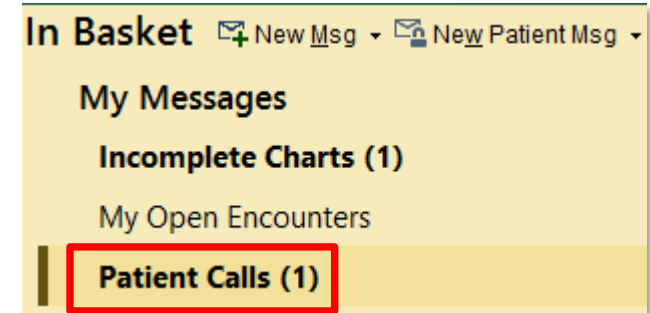
The screenshot displays the E-Referral Conversation and Routing interface. The 'E-Referral Conversation' section is highlighted with a red box, showing a 'Create Note' button. Below it, a message states: 'No notes of this type filed. A new note is open and in progress which has not yet been saved.' The 'Routing' section is also highlighted with a red box, showing a 'Recipient' field and a 'Close Workspace' button. The 'Routing' section includes a 'Route as:' dropdown menu set to 'Patient Calls', a 'Priority:' section with radio buttons for 'High', 'Routine' (selected), and 'Low', and a 'Modifier' field. To the right of the 'Recipient' field, there are buttons for 'Add PCP', 'Add My List', 'Build My Lists', 'Clear All', and 'Add Fax', along with the text 'Faxes to send: 0'. At the bottom left, there is a 'Pool for replies:' field and a 'View Routing History' link. At the bottom right, there is a 'Close Workspace' button.

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

1

Referral/Authorization Workqueue - NEUROLO

Refresh Defer Show All Notes Edit Edit w/ Related

Active (Total: 17) Deferred (Total: 0)

Patient Name	Priority	Type
Ambtest, Natalie	Schedule In Office	Advice Only
Ambtest, Mary	Schedule Video Visit	Advice Only
Zztest, Broncos	Routine	Advice Only

2

Referral # 392

MRN: 30000518
Insurance: No Coverage
Pre-Auth Phone: No Coverage

Status **Authorized**

Auth reason

AMBTEST,ALMONDROCA (as of 3/15/2021)

Plan	Mem/Ins ID	Service Area	Verif St...	Eff Date	Term ...	Auth #	Precert #	Auth ...
HMSA PPO	R12222555	HAWAII PAC	New	1/1/2016		12355545		

2

Referral # 392

MRN: 30000518
Insurance: No Coverage
Pre-Auth Phone: No Coverage

Status **Authorized**

Auth reason **No Approval Necessary**

AMBTEST,ALMONDROCA (as of 3/15/2021)

Plan	Mem/Ins ID	Service Area	Verif St...	Eff Date	Term ...	Auth #	Precert #	Auth ...
HMSA PPO	R12222555	HAWAII PAC	New	1/1/2016				

Scheduling Appointments from the Workqueue

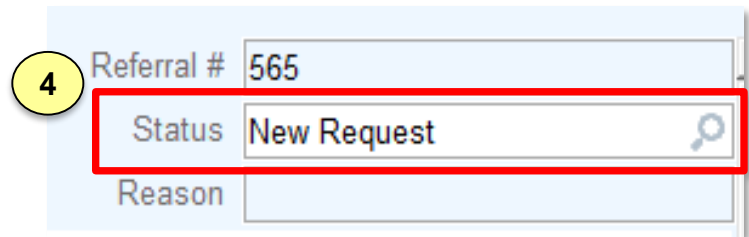
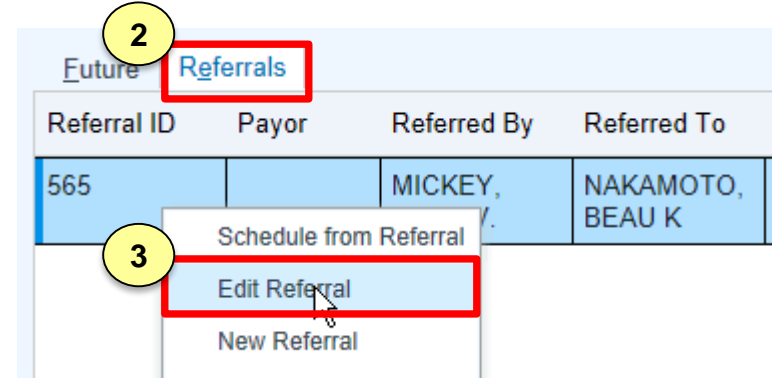
Intended Audience: Consulting Department Staff

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**

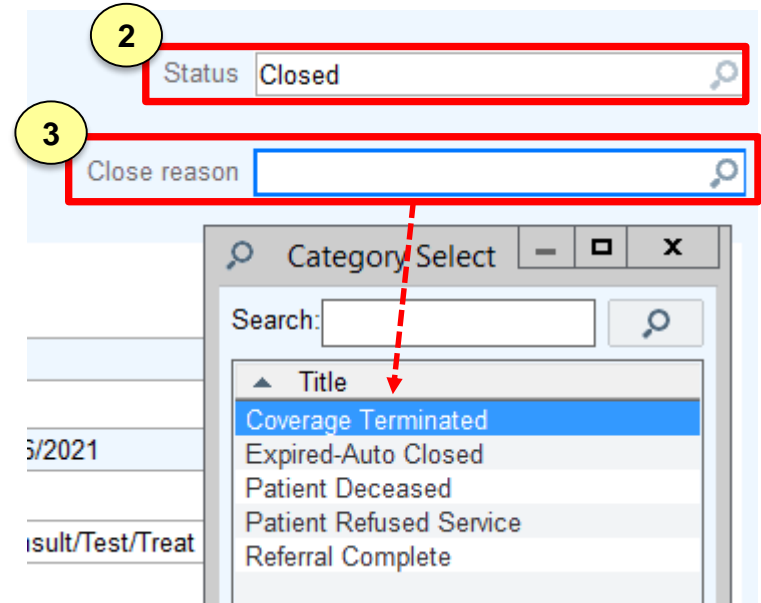


Removing Referrals from the Workqueue

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

The screenshot shows the 'Chart Review' interface. The 'Encounters' tab is active, displaying a table of recent visits. The first row is highlighted with a red box, showing an 'E-Referral Response' encounter on 04/28/2021 in the Neurology department, performed by Shu, Huidy, MD. To the right, the details for this encounter are shown, including the title 'E-Referral Response', the date 4/28/2021, and the provider's name and specialty. Below the title, there are sections for 'Progress Notes' and 'Conversation'. The 'Additional Documentation' section at the bottom has a red box around the 'E-Consult' link under the 'Flowsheets' category.

Date	Type	Department	Provider
04/28/2021	E-Referral Response	Neurology - Pali Mom...	Shu, Huidy, MD
04/28/2021	Orders Only	Internal Medicine - Str...	Noon, Sandra K, DO

E-Referral Response 4/28/2021
Neurology - Pali Momi Clinic

Shu, Huidy, MD
Neurology

Progress Notes
Shu, Huidy, MD (Physician) • Neurology • Encounter Date: 4/28/2021 • Signed
This is my note for this e-referral. I need to figure out how to run spell check on this
[Note Details](#)

Conversation (Oldest Message First)
May 11, 2021
Shu, Huidy, MD
Note 11:12 AM
Hey Referring MD. What medications has the patient tried, for how long, and outcomes?

Additional Documentation
Flowsheets: **E-Consult**
Encounter Info: [Billing Info](#), [History](#), [Allergies](#), [Detailed Report](#)