Referrals

The Epic Referral module is used to document:

- Insurance authorizations for referrals from a PCP to a Specialist
- Authorizations & Pre-certifications for diagnostic testing
- Referral tracking purposes
- Communication between offices

Three Referral Classes

- **Internal:** Integrated physician to another Integrated physician
- **Incoming:** Non-Integrated physician to an integrated physician.
- **Outgoing:** Integrated physician to a Non-Integrated physician.

How is a Referral Created

- **Referral Order:** A referral record will automatically generate when a Non-Integrated provider places an order in the patient’s medical record to see another physician for specialty care (i.e. Ambulatory Referral to Cardiology).
- **Procedure Order:** A referral record will automatically generate when a Non-Integrated provider places certain hospital outpatient procedure orders in the patient’s medical record for tests or procedures (i.e. Sleep Study, MRI, CT orders).
- **Manual Entry:** Co-workers in performing departments can manually create electronic referral records if they receive paper orders or referrals from Non-Integrated providers.

Referrals are typically monitored through three referral workqueues in the ambulatory clinics:

- **Department’s Referral Outgoing:** a workqueue to track outgoing ambulatory referrals to other physicians
- **Department’s Referral Incoming:** a workqueue to track incoming ambulatory referrals to their physicians
- **Department’s Procedure Referral:** another workqueue to track outgoing hospital procedure orders (i.e. MRIs, CT Scans, ultrasounds)

Try it Out

How do I access the Referral Workqueue?

The Referrals workqueue allows you to see a comprehensive list of referrals that need to be scheduled.

1. Click **Epic>Referrals> Workqueue List**.
2. Select the **Referrals** Tab.
3. Locate your department’s referral Workqueues.
4. If you are having trouble finding your Workqueue, select the **Filter** button to filter out referral workqueues that do not apply.

How do I schedule a referral from the WQ?

1. Highlight the patient’s referral and click **Schedule**.
2. The make appointment activity appears.
3. Complete the scheduling process as normal.
4. Once the appointment is scheduled and authorized the referral will drop off of the Workqueue.

How do I customize my referral Workqueue?

The Workqueue can be tailored to meet your working needs by using the **Customize columns** hyperlink.

1. **Columns**: Allows you to remove and/or rearrange multiple columns. Removing a checkmark removes the column from this workqueue.
2. **Sort**: Allows you to order the information displayed in your workqueue across multiple columns

How do I assign a coworker to a referral?

1. To Assign to Self, Assign to Others or Unassign a User to a contact, highlight the contact and select the arrow next to the Assign to User button.
2. Coworkers can see who is assigned to a contact by viewing the Assigned To column.
3. The **Show Mine** button can be selected to see only contacts that have been assigned to the coworker. To remove the filter, select the Show Mine button again for all contacts to display.

How do I Schedule a Referral from the Appointment Desk?
1. Open your patient’s Appt Desk.
2. Select the **Referrals** tab.
3. Highlight the appropriate referral for the visit.
4. Select **Schedule** at the bottom left.
5. Utilizing this button links the referral and the appointment.

6. Complete the scheduling of your appointment.
7. At the Appt Desk, select the **Future** tab.
8. Verify the Referral icon displays in the RFL column of the appointment.

### How do I Assign a Referral to a Pre-existing Appointment?

Radiology orders require that the appointment be scheduled from the order, you cannot link orders/referral to a referral after it has been scheduled.

1. From the Appointment Desk highlight the future appointment which needs a referral assigned.
2. Right click on the appointment and select **Assign Referral**.
3. The Referral Action activity window opens.
4. Highlight the appropriate referral.
5. Click **Assign**.
6. Click **Close** to exit the Referral Action activity.

### How do I create an Incoming referral (NonRadiology)?

1. **Epic Button>Referrals>Referral Entry**.
2. Search for your patient and click **New**. The Referral Action activity opens.
3. In the Type field, enter the **Referral Type (Eval and Treat)**.
4. In the Class field, enter the appropriate class of **Incoming**.
5. Now enter the **Referral by Provider**, and the **Referral to Department and Provider**.

![Image of referral form]

6. Now enter the number of visits that are approved in the **Requested/Authorized Visits** total field.
7. Click on the **DX/Px** form in the navigator window. Enter a coded **diagnosis code** and the **procedure code**.

![Image of DX/Px form]

8. Click **Accept**.
9. The referral will now display on the departments “Referrals In” Workqueue and can be scheduled and Authorized like an internal referral.

**How do I authorize a referral?**

1. Click the **Authorization** form on the referral form navigator.
2. Notice the **Auth #** column to the right of the coverages. Authorization numbers are entered here.
3. Click the **Approve** radio button under the Decision section.
4. Choose an option under the **Reason** section on why the referral was approved.
5. Click on the **Notes** and enter any notes that will be helpful to you or others about this referral.
6. Select **Accept** to complete the referral.
7. Click **Close**.
How do I complete an outgoing referral?

An outgoing referral will begin as an Internal Referral does, with the order and auto generation of the referral record.

1. The Referral Class will default to **Outgoing**.
2. The Referred From provider will be the Ordering physician and Department.
3. The **Referred To POS or Provider** must be entered to ensure the transition of care information is sent.

4. An outgoing referral will never be assigned to an appointment within Epic. The outside scheduling information can be entered on the scheduling page by selecting **External Appointment**.
5. The referral must have a status of **Authorized** with an Authorization reason for the transition of care information to send.
6. Notes can be documented on the **Notes** page.
7. **Click Accept**.
8. Once the referral has been completed appropriately and accepted. Reopen the referral and navigate to the **Notification History Page**.
9. A notification will display the date and time the Transition of Care document was sent.
10. Additional information can be sent by sending **Release of Information Referral Packet**.
Monitor the **RFL Status** column on the workqueue. A referral that is “open” has not yet been authorized or completed. Also, be sure to monitor the **RFL Scheduling Status** column. If a referral scheduling status says, “Patient Refused” or “Unable to Contact,” you may need to double check with the ordering provider whether or not to pursue contact with the patient.

Referrals will drop off of the workqueue if they are marked as “Closed.” The system will automatically close a referral when it reaches its expiration date. Co-workers can manually mark a referral status as “Closed” in special circumstances, such as a patient who refuses service and will not be scheduled for a specific appointment or procedure.

Referrals will also drop off of the workqueue if the scheduling status is “Some Visits Scheduled” or “All Visits Scheduled” AND the referral status is “Authorized.” If the referral is authorized but the visits have not yet been scheduled, the referral will remain on the workqueue.