PCC Pediatric EHR Solutions

Referral Workflow

Ordering a Referral

1. The *provider* orders the referral during a visit or phone note
2. The *provider* types information about the referral into the **Results** box (eg: ICD10 code, reason for referral, timeframe for referral)
3. The *provider* chooses the task type **Referral Needed** and assigns the task to the *Referral Coordinator* user
4. The *Referral Coordinator* generates a referral form and any other needed documentation
5. The *Referral Coordinator* tracks notes in notes box for their task and clicks the **Tasks Completed** checkbox
6. The *Referral Coordinator* clicks the **Add Task** button
7. *Referral Coordinator* chooses the task type **Confirm Outcome** and assigns the task to the *Pending Referral* user. If an appointment for the referral was made by the office, set the due date for this task to a week after the appointment date.

Importing Results

1. Find the result in the **Import Documents** tool
2. Attach the result to the patient
3. Choose the **File as Unattached Document** option, filling in the date of the consult
4. Choose the ordering provider's name from the **Needs to be Signed by Provider** drop down
5. Save the result, and close the **Import Documents** tool
6. From the schedule screen, choose the patient from the drop down list in the **patient finder** to open the patient's chart
7. In the **Outstanding Tasks** component, double-click the referral order to open it
8. Mark the **Pending Referral** task as completed
9. The *provider* finds the result on **Signing queue**, creates a followup task if needed and clicks **Sign**