

Understanding Referral Response Actions

The referral response process allows the user to view/edit linked documents and view the history of the created referral. To access these actions; we start with opening the referral list.

The screenshot shows the 'Referral List' window with a table of referrals. A red arrow points to the 'Quick Actions' column, which contains icons for 'View', 'Edit', 'Link', and 'Unlink'. Below the table, a red arrow points to the 'Quick Actions' menu that appears when a referral is selected.

Patient Name	Referred To	Referred From	Date of Referral	Status	Quick Actions	Referral Type	To Service	To Location	From Service	From Location	Sch
AQUAMAN, TEST	Drewart, Mark	Bishop, Danielle	01-03-2018	Pending	[Icons]	Internal		470 Clarkson An.		470 Clarkson An.	No
INTERNAL PROVIDER	Physiciansb, SUNYDMC	Bishop, Danielle	01-03-2018	Complete	[Icons]	Internal		470 Clarkson An.		470 Clarkson An.	No
INTERNAL PROVIDER	Physiciansb, SUNYDMC	Bishop, Danielle	01-03-2018	Pending	[Icons]	Internal		470 Clarkson An.		470 Clarkson An.	No
INTERNAL PROVIDER	Bishop, Danielle	Physiciansb, SUNYDMC	01-03-2018	Complete	[Icons]	Internal		470 Clarkson An.		470 Clarkson An.	No
INTERNAL PROVIDER	Drewart, Mark	Bishop, Danielle	01-03-2018	Complete	[Icons]	Internal		470 Clarkson An.		470 Clarkson An.	No

Show/Modify

View and edit referral information.

The screenshot shows the 'Edit Referral' form for a referral to 'Physiciansb, SUNYDMC'. It includes fields for 'Date of Referral', 'Exp. Date', 'Status', 'Referred To', 'Facility', 'Service', and 'Referred From'.

View Linked Documents

Access documents linked to the referral.

The screenshot shows the 'Link/Unlink Documents' dialog box. It displays a table of linked documents with columns for 'Date of Service', 'Date', 'Document Name', 'Authorized By', 'Document Type', and 'Document Status'. A red arrow points to the 'Link' button.

Date of Service	Date	Document Name	Authorized By	Document Type	Document Status
01-18-2018	01-18-2018	GERD, Adult (OPC) Bishop, Danielle	Bishop, Danielle	Response	Complete
01-03-2018	01-03-2018	Referral Form Bishop, Danielle	Bishop, Danielle	Referral Request	Complete

Link/Unlink Documents

Link/Unlink preferred documents with this referral.

The screenshot shows the 'Link/Unlink Documents' dialog box with a table of linked documents. A red arrow points to the 'Link' button.

Date of Service	Date	Document Name	Authorized By	Link Type	Document Status	Document Type
01-18-2018	01-18-2018	GERD, Adult (OPC) Bishop, Danielle	Bishop, Danielle	Response	Complete	Structured Note
01-03-2018	01-03-2018	Referral Form Bishop, Danielle	Bishop, Danielle	Referral Request	Complete	Structured Note

Completing the Referral Order

The screenshot shows the 'Order Summary' dialog box for a referral to 'Physiciansb, SUNYDMC'. It includes fields for 'Referral to Clinic', 'Requested by', and 'Requested by Physicianb, SUNYDMC'. A red arrow points to the 'Complete' button.

Referral Completion

Mark completed referrals with a status of "Completed".

The screenshot shows the 'Referral List' window with a table of referrals. A red arrow points to the 'Quick Actions' menu, which has 'Completed' selected.

Create a custom referral view

From the referral list you are able to filter referrals by status. These custom filters can be saved for future use.

The screenshot shows the 'Custom Filter' dialog box. It includes fields for 'Filter Name', 'Filter Type', and 'Filter Status'. A red arrow points to the 'Save' button.

The screenshot shows the 'Referral List' window with a table of referrals. A red arrow points to the 'Custom Filter' button.

Click the save icon and create a name for this view

The screenshot shows the 'Referral List' window with a table of referrals. A red arrow points to the 'Save' button.

Select your personal view to quickly filter the list

Access the activity log for a referral.

Event	Context	Label	Old Value	New Value	User	Last Modified On
Create Referral	Referred From - (Bishop, Danielle)	Provider ID (UID)		0054 3127	Bishop, Daniel	08-21-2017 09:44
Create Referral	Referred From - (Bishop, Danielle)	Provider ID (Type)		UID	Bishop, Daniel	08-21-2017 09:44
Create Referral	Referred From - (Bishop, Danielle)	Provider ID (Primary)		DBSHOP	Bishop, Daniel	08-21-2017 09:44
Create Referral	Referred From - (Bishop, Danielle)	Provider ID (Type)		Primary	Bishop, Daniel	08-21-2017 09:44
Create Referral	Add Referral	Status	Pending	Send Referral	Bishop, Daniel	08-21-2017 09:44

If you have additional questions or concerns please call the "Global HelpDesk" at 7182704357 option # 1