

Important Content Update Message

We are currently updating the OP Help Center content for the release of OP 20. OP 20 (official version 20.0.x) is the certified, 2015 Edition, version of the Office Practicum software. This is displayed in your software (**Help tab > About**) and in the Help Center tab labeled Version 20.0. We appreciate your patience as we continue to update all of our content.

Writing a Referral to a Specialist



Last Modified on 11/07/2019 3:35 pm EST

Version 20.0

Path: Clinical or Practice Management tab > Schedule button > Tracking radio button > Task button > Double-click Referral task

Path: Clinical, Practice Management, or Billing tab > Patient Chart button > Referrals/TOC > New button


Path: Clinical, Practice Management, or Billing tab > Patient Chart > Encounters or Well Visits > New Note > Referrals/TOC > New button

1. Navigate the Referrals window following one of the paths above.
2. In the Type of Referral/Care Transition section at the top of the window, select the **Referral to a specialist** radio button. The Status automatically updates to Pending (Awaiting Response). This enters the Referral into the Referral Tracking system.
3. Using the drop-down menus, edit the **Written Date** (defaults to today's date) and the **Flag Date** (alerts you on that date if you have not received a notice that the patient went), if necessary.
4. Edit the Referring Provider, if necessary.
 - a. Click the **Provider Search** button  to open the Staff Name Lookup window.
 - b. Select the Referring Provider.
 - c. Click the **OK** button.
5. Enter the Provider to whom the patient is being referred:
 - a. Click the **Address Book** button  to the right of the Referred to field. The Address Book opens.
 - b. Search for and select the specialist. The Search by drop-down menus and Show Only checkboxes can be used to isolate your search to a particular specialty.
 - c. Click the **Select** button. All of the specialist's Address Book information is transferred over automatically.

Note: If your practice provides a list of specialists to the parent to make their own choice and



appointment, you can click the Specialty drop-down menu and select the specialty the child is being referred to. This list can be printed by clicking the **Print** button.

6. Enter the appropriate data in the fields that were not auto-filled such as remaining specialist contact info and DX information.
7. In the Reason for referral field, enter the reason for referral in one of the following ways:
 - Enter text directly into the field.
 - Click the **Phrase Construction** button  to enter the text using Phrase Construction notebooks.
 - Copy and paste information from one of the patient's records, such as an Encounter Note, into the referral.
8. If applicable, select an option from the **Report Contents** drop-down menu.
9. If applicable, complete the Insurance/Admin tab:
 - a. Click the **Insurance / Admin** tab. The patient's insurance automatically populates. The **Clear** button can be used to delete this information from the letter if it is not required. If the patient's insurance requires Prior Authorization, select the appropriate radio button for the Authorization status.
 - b. Enter the Date Range in which the referral will be active.
 - c. Enter the number of authorized visits using the up/down arrows (if applicable).
10. When finished, click the **Send, Print, or Save** button. The referral is created and can be accessed from the Main Navigation Panel for tracking purposes.
 - **Send:** Click [here](#) to learn how to send the referral as CDA to a DIRECT message recipient.
 - **Print:** Print the referral and related documents.
 - **Save:** Save the referral to the patient's chart but does not prompt for the referral to be sent or printed.



Note: To reprint, highlight the referral to be printed, and click the **Print** button.

Version 14.19

1. Open the **Patient Chart > Referrals/TOC**.
2. Click **New**. The **Referral/Care Transition Details** form is displayed on the **Medical Documentation** tab.
3. Under **Type of Referral/Care Transition**, select **Referral** to a specialist.
4. Under **Status** select **Pending (Awaiting Response)**. This enters the Referral into the Referral Tracking system.
5. Using the **Drop-Down Menus**, you can change the **Written Date** (defaults to today's date) and the **Flag Date** (alerts you on that date if you have not received a notice that the patient went).
6. To the right of the **Referring Provider** field, click the **Doctor** button
7. Enter the **Name** of the **Provider** writing the letter

8. Using the **Staff Name Lookup** form, select a **Provider** .
9. In the **Referred to** field, click the **Address Book** button or **Patient Information** button (next to the **Provider** field) and enter the **Specialist's Name** by selecting a **Name** or **Practice** from the **Drop-Down Menu**.

Tip: Select from the Category drop-down menu, the specialty the child is being referred to for a list of all providers associated with that specialty in your Address Book. Once a provider or practice is selected, all of the specialist's available contact information is transferred over automatically.

Note: If your practice provides a list of specialists to the parent to make their own choice and appointment, you can click the Specialty drop-down menu and select the specialty the child is being referred to. Details of which Provider the appointment was made with can be entered at a later time.

10. Enter the appropriate **Data** in the **Fields** that were not auto-filled.
11. Enter the **ICD code(s)** for all referred procedures.
12. In the **Reason for referral** field, enter the **Reason** for referral in one of the following ways:
 - Enter text directly in the **Text** field.
 - Click the **Use Phrase Construction** icon to the left of the Text field to enter the text using the Phrase Construction system.
 - Copy and paste information from one of the patient's records, such as an Encounter Note, into the referral.
13. If applicable, select an option from the **Report Contents** drop-down menu.
14. Click the **Insurance / Admin** Tab.
15. The Patient Insurance automatically populates. Click the **Clear** button to delete this information from the letter if it is not required.
16. If the patient's insurance requires Prior Authorization, select the appropriate **Radio Button** for the Authorization status.
17. Enter the **Date Range** in which the referral will be active by clicking the **Down-arrow** and selecting **Dates** from the drop-down calendars (if applicable).
18. Enter the **Number of Authorized Visits** using the up/down arrows (if applicable).
19. When finished, click the **Send, Print, or Save** button. The window closes and you are returned to the **Referrals / Care Transition List**
20. To reprint, highlight the **Referral** to be printed and click the **Print** button. The complete text of the referral will be saved in the Patient Chart > Referrals/TOC, and is displayed in Medical Records, as well as the Referrals tab on the main navigation panel.

Pending Referrals will display in the Main Navigation Panel under the Referrals tab for tracking purposes.