

We are currently updating the OP Help Center content for the release of OP 14.19 or OP 19. OP 19 is a member of the certified OP 14 family of products (official version is 14.19.1), which you may see in your software (such as in Help > About) and in the Help Center tabs labeled 14.19. You may also notice that the version number in content and videos may not match the version of your software, and some procedural content may not match the workflow in your software. We appreciate your patience and understanding as we make these enhancements.

# Referrals and Transitions of Care

Last Modified on 09/26/2019 1:33 pm EDT

Version 20.0

Referrals and letters (such as that for medical clearance or insurance appeals) are managed from the Referrals/Care Transition List in a patient's chart. This list displays all of a patient's referrals chronologically. From here, users can view, create, and edit referrals or transitions of care. Referral letters awaiting response are not only listed in this list in the patient chart, but they are also tracked in the Referrals tab of the Clinical Work window.

The following steps instruct on how to mark a pending referral as complete. Please note, that this does not include the complete list of steps for reconciling any clinical data.

1. Click **Referrals** on the Main Navigation Panel. The Clinical Work window is displayed with the Referrals tab selected.
2. Select the Appropriate Scopes and Date parameters.
3. Select the referral from the list, and click the **Review/Edit** button. The Referral/Care Transition Details window opens.
4. Select the **Complete** radio button.
5. Click the **Save** button.

Version 14.19

## Overview

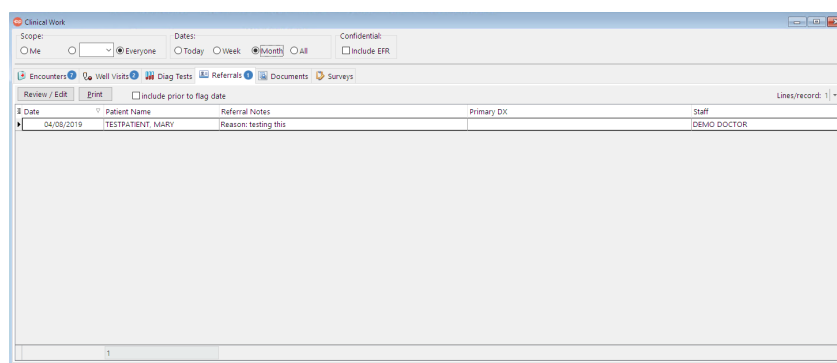
**Path: Patient Chart button > Referrals/TOC tab > New button**

Office Practicum allows you to view, create, and edit referrals and letters regarding specific patients using the Referrals / Care Transition List. While referrals are addressed to specialists only, a letter can be used for medical clearance, insurance appeals, and letters of recommendation.

Referrals Letters on behalf of patients are stored chronologically in the Referrals / Care Transition List table in the patient's chart. Referral letters awaiting response are tracked through Referrals found in the Clinical Work tab.

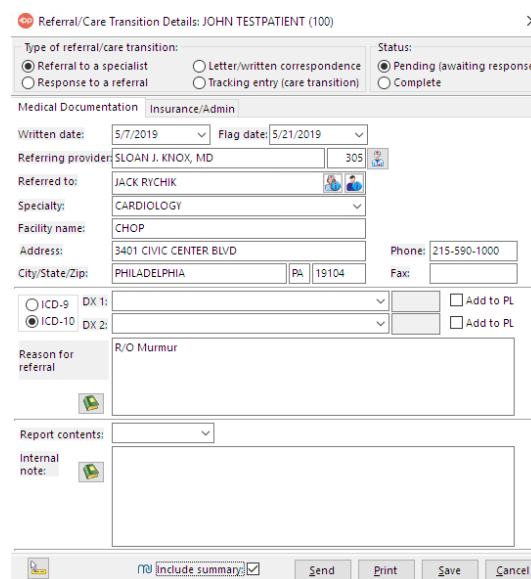
In this section you will learn how to review and complete open referral requisitions. You will also learn how to monitor the open referral and perform follow up. There are optional settings to ensure all open referrals are addressed.

1. Click **Referrals** on the Main Navigation (left) panel. The Clinical Work window is displayed with the Referrals tab selected.



**i** To view Referrals created prior to the current date, select a value from the Dates radio button selections. To view Referrals for other users, select from the Scope field.

2. Select a **Patient Referral** from the list.
3. Click the **Review/Edit** button. The Referral/Care Transition Details window displays.



4. Select the **Complete** radio button in the Status section.
5. Click the **Save** button.

