Patient Chart: Referrals/TOC (Transitions of Care)

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Version 14.19

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*This window map article points out some of the important aspects of the window you're working with in OP but is not intended to be instructional. To learn about topics related to using this window, see the **Related Articles** section at the bottom of this page.*
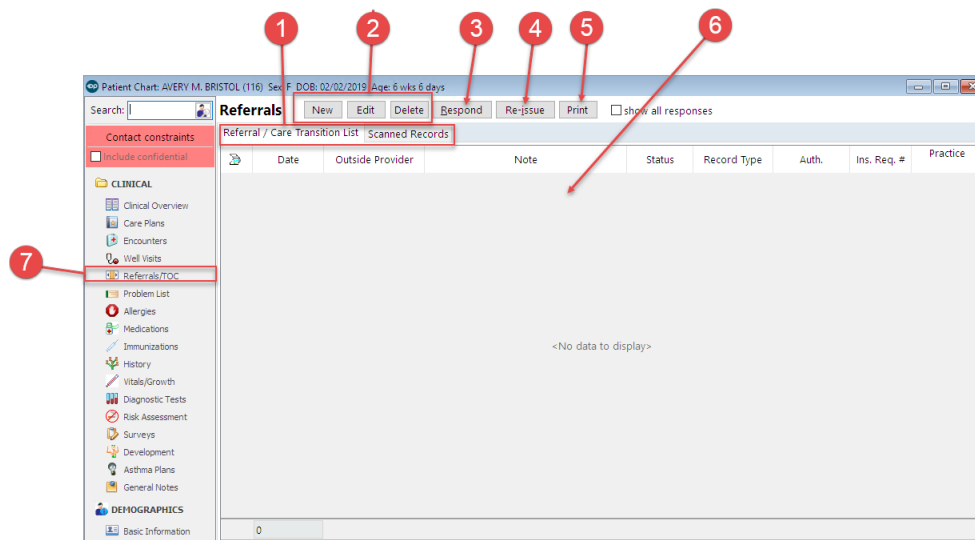

About Patient Chart: Referrals/TOC (Transitions of Care)

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

The Referrals/TOC button opens the patient's Referrals window, a complete list of entered and scanned referrals and general letters. Referral Letters on behalf of patients are stored chronologically in the Referrals/Transition of Care (TOC) List table in the patient's chart. Referral letters marked as awaiting response will also be tracked through the Clinical Work Workflow, where you can view and contact patients regarding pending referrals. While referrals are addressed to specialists only, a letter can be used for medical clearance, insurance appeals, and letters of recommendation.

📌 **Note**: Just like a paper chart, the electronic chart in OP contains personal health information and should be kept protected and confidential. Always close all windows on your screen and log out of OP when you are not at your workstation.

Patient Chart: Referrals/TOC Map

Number	Section	Description
1	Function buttons	The function buttons add, edit, or remove the selected referral or general letter in the Referrals/TOC grid.
	Patient/Care Transition	• **Patient/Care Transition List**: The Patient/Care Transition List is a complete chronological list of entered and scanned referrals and general letters. • **Scanned Records**: The Scanned records tab displays a patient's scanned item with the label "Referral Letter" as the item type in its document properties. This

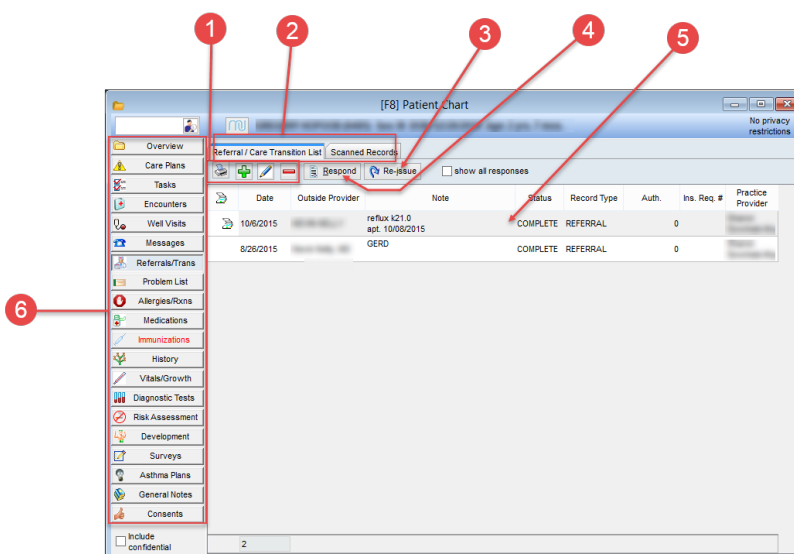| 2	List and Scanned Records Tabs	tab sorts images by date, category staff, etc. It also can change the recipient directly from the scan window. This tab does not include items linked directly to the notes on the Patient/Care Transition List tab.
3	Respond button	The **Respond** button creates a response to the selected referral.
4	Re-issue button	The **Re-issue** button makes a copy of the selected referral. This is helpful when making changes to a referral. Reissuing a referral will place the new referral to a pending referral status (which will display in the Clinical Work window under the referrals tab for tracking purposes).
5	Print button	The **Print** button prints the selected referral or general letter in the Referrals grid.
6	Patient Care/Transition List grid	The Patient Care/Transition List grid displays a complete chronological list of entered and scanned referrals and general letters for the patient.
7	Referrals/TOC button	The Referrals/TOC button accesses the Referrals window in the patient's chart.

Version 14.10

About the Patient Chart: Referrals/Transition Tab

Path: Smart Toolbar > Chart button > Referrals/Transition tab

The Patient Chart is the central point of access to all areas of a patient's complete Medical record. Use the Patient Chart to access and maintain patient records. The Referrals/Transitions tab opens the patient's Referral/Care Transition List, a complete list of entered and scanned referrals and general letters. Referral Letters on behalf of patients are stored chronologically in the Referrals/Care Transition List table in the patient's chart. Referral letters marked as awaiting response will also be tracked through the Schedule & Practice Workflow, where you can view and contact patients regarding pending referrals. While referrals are addressed to specialists only, a letter can be used for medical clearance, insurance appeals, and letters of recommendation.

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Patient Chart: Referrals/Transition Tab Map

Number	Section	Description
1	Function buttons	The function buttons print, add, edit, or remove the selected referral or general letter in the in the Referrals/Transition grid.
2	Tabs	Tabs in the Patient Chart: Referrals/Transition are: • **Patient/Care Transition List**: The Patient/Care Transition List is a complete chronological list of entered and scanned referrals and general letters. • **Scanned Records**: The Scanned records tab displays a patient's scanned item with the label "Referral Letter" as the item type in its document properties. This tab sorts images by date, category staff, etc. It also can change the recipient directly from the scan window. This tab does not include items linked directly to the notes on the Patient/Care Transition List tab.
3	Re-issue button	The **Re-issue** button makes a copy of the selected referral. This is helpful when making changes to a referral. Reissuing a referral will place the new referral to a pending referral status (which will display in the Schedule and Practice Workflow Window under the referrals tab for tracking purposes). See **Re-issuing a Referral Letter**.
4	Respond button	The **Respond** button creates a response to the selected referral.
5	Patient Care/Transition List grid	The Patient Care/Transition List grid displays a complete chronological list of entered and scanned referrals and general letters for the patient.
6	Left tabs	The left tabs open a different section within the patient's medical records. The Patient Chart contains the following left tabs: • **Overview** • **Care Plans** • **Tasks** • **Encounters** • **Well Visits** • **Messages** • **Referrals/Trans** • **Problem List** • **Allergies/Rxns** • **Medications** • **Immunizations** • **History** • **Vitals/Growth (Vitals/Growth Charts)** • **Diagnostic Tests** • **Risk Assessment** • **Development** • **Surveys** • **Asthma Plan** • **General Notes** • **Consents**