

Clinical Work: Referrals

Last Modified on 11/21/2022 8:26 am EST

Version 20.18

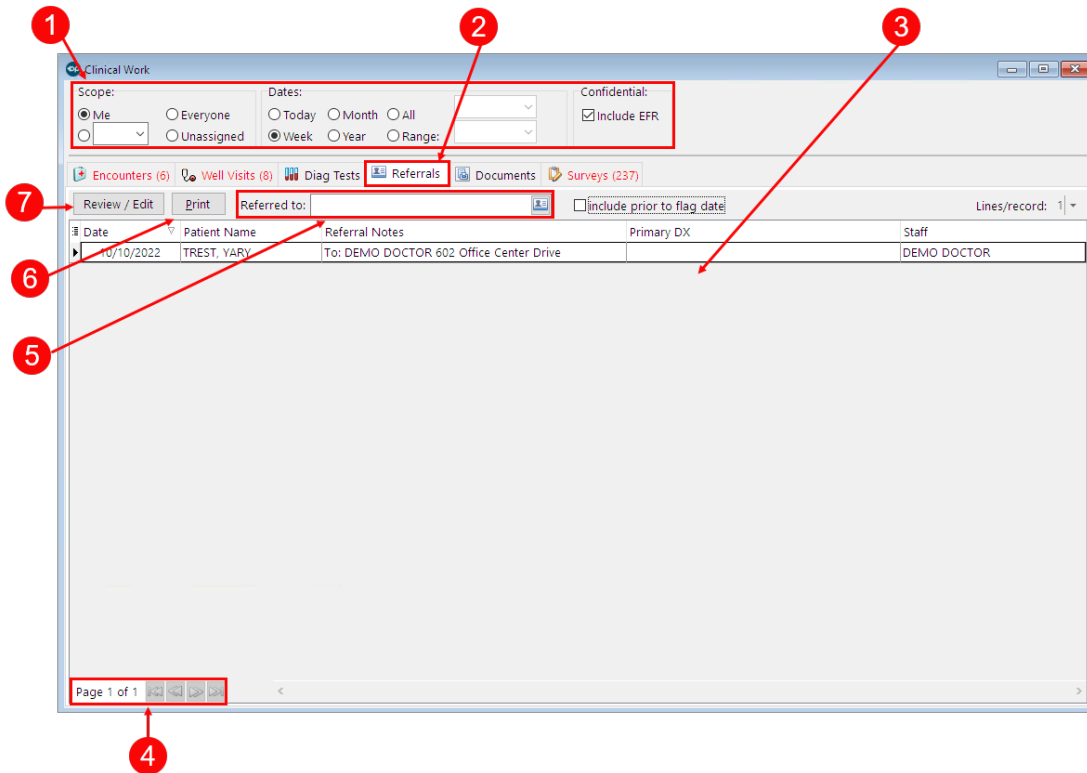


This window map article points out some of the important aspects of the window you're working with in OP but is not intended to be instructional. To learn about topics related to using this window, see the **Related Articles** section at the bottom of this page.

About Clinical Work: Referrals

Path: Main Navigation Panel > Referrals (Clinical group)

The Clinical Work window contains the Referrals tab. The Referrals tab displays pending referrals. From this tab, you can select a referral to review, edit, or print. Referrals are displayed based on the selections made in the Scope field.



Clinical Work: Referrals Map

| Number | Section | Description |
|--------|---------|-------------|
|--------|---------|-------------|

| | | |
|---|---------------------------|---|
| 1 | Scope | <p>The Scope field narrows the parameters for the displayed tab. Users must have the Messaging_Allow_View_All_Messages permission in their profile to see the Scope field.</p> <ul style="list-style-type: none"> • Scope: Everyone, Me or select a staff member from the drop-down menu. • Dates: Select today, week, month, year, or all, or enter a specific date range to narrow the list of referrals within the Referral Record List Grid • Confidential: the Include EFR checkbox can be selected to include confidential referrals in the grid. |
| 2 | Referral Tab | The Referral tab of the Clinical Work window. The count represents the number of referrals that may need to be reviewed. |
| 3 | Referral Record List grid | The Referral Record List grid displays pending referrals based on the selections made in the Scope field. |
| 4 | Pagination icons | The pagination icons are used to move to pages within the selected window. |
| 5 | Referred to field | The Referred-to field allows users to type and search for a Provider's name by pressing Enter on their keyboard or using the Address Book button. Once a Provider is selected, the Referral record list displays referrals sent to the selected Provider. |
| 6 | Print button | The Print button prints the Referral record list displayed in the Referrals Record List grid. |
| 7 | Review/Edit button | The Review/Edit button opens the Referral/Care Transition Details window for the selected referral in the Referral Record List grid. Doing this will allow you to review or edit a referral to a specialist, respond to a referral, create a correspondence, and input a tracking entry for the care transition |

Version 20.17

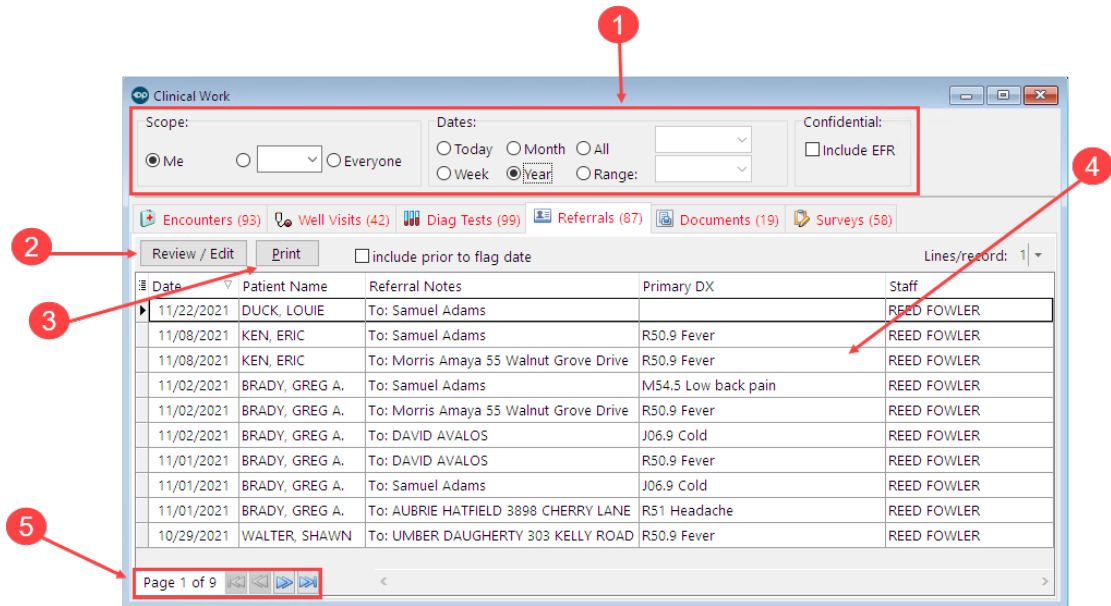


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