

Referral Workflow: Create a Response to a Referral

Last Modified on 12/30/2021 8:33 am EST

Version 14.19

About

In this article, you will be presented with a workflow to complete a referral, which is often referred to as "closing the referral loop". The article is written after the specialist report has been received, scanned and assigned to a provider for review. Click [here](#) for information on scanning and attaching a document to a referral.

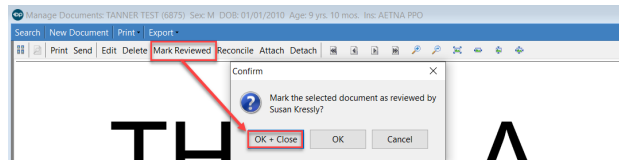


Note: The completing a referral may be different than your practice workflow. Always follow your practice policy and procedure.

1. Click **Documents** on the Main Navigation Panel.
2. Click to highlight a patient in the Referral Letter type.
3. Click the **Patient Chart** button and select **Referrals/TOC**.
4. Click the scanner icon to the left of the Referral to be reviewed.

Referrals									
Referral / Care Transition List									
Date	Outside Provider	Note	Status	Record Type	Auth.	Ins. Req. #	Practice		
11/8/2019	Robert Anolik	Allergy testing	PENDING	REFERRAL		0	Susan J. Kressly, MD		

5. The scanned document appears in the **Manage Documents** window.
6. Once the scanned document is reviewed, click the **Mark Reviewed** button then click the **OK + Close** button. You are returned to the Referral / Care Transition List.



7. Confirm the referral is highlighted, click the **Respond** button.
8. Select the **Response to a referral** radio button. All prior referral information will populate the Response to a Referral window.
9. Document additional information from the review of the scanned report.
10. Complete the **Reconciliation** section.
 - a. From the Reconciliation section, select the radio button for **Performed** or **Not Required**.
 - b. The **Reconciled by** will default to the user logged into the OP software if Performed was selected. To change the provider or if Not required was selected, click the **Provider** button and select the provider from the list.
 - c. The **Reconciliation date** will default to the current date and time if Performed was selected. To change the date or if Not required was selected, click the drop-down arrow and select the date from the calendar.

Referral/Care Transition Details: TEDDY TEST (6885) Sex: M DOB: 07/08/2014 Age: 5 yrs. 4...

Type of referral/care transition: Referral to a specialist Letter/written correspondence Pending (awaiting response) Complete

Medical Documentation Insurance/Admin

Written date: 11/8/2019 Flag date: 11/22/2019

Responding prov: SUSAN J. KRESSLY, MD 305

Response to: ROBERT ANOLIK

Specialty: ALLERGY/ASTHMA

Facility name: ALLERGY AND ASTHMA SPECIALISTS

Address: Phone: 180086cough

City/State/Zip: Fac:

ICD-9 DX 1: Add to PL

ICD-10 DX 2: Add to PL

Response/Findings: [ORIGINAL REFERRAL>>> [Dated: 11/08/2019] Allergy testing <<<END ORIGINAL REFERRAL]

Report contents: Linked referral: 5626

Internal note:

Reconciliation: Not performed Performed Not required

Reconciled by: 305 Reconciliation date: 11/8/2019 9:19:41 AM

Send Print Save Cancel

11. Click the **Save** button. The referral and response records are marked as Complete.
12. Close the chart. You are returned to the **Documents** tab.

Note: If a new medication was prescribed, a medication allergy or problem was noted on the document, it is the responsibility of the practice to update the patient chart.

Version 14.10

Overview

In this article you will be presented with a workflow to complete a referral, which can be referenced as closing the referral loop. The article is written after the specialist report has been received, scanned and assigned to a provider for review. Click [here](#) for information on scanning and attaching a document to a referral.

Note: The referral workflow documented here may be different than your practice workflow. Always follow your practice policy and procedure.

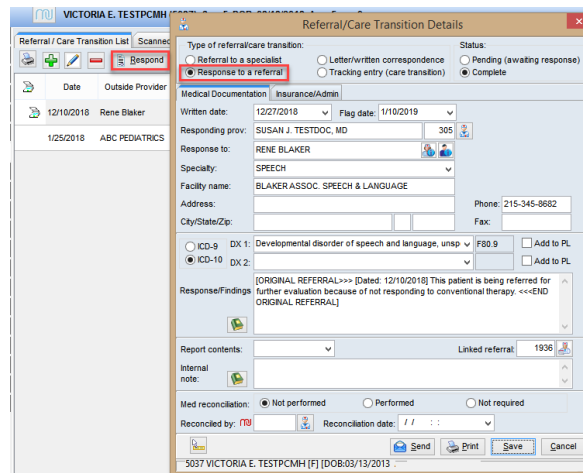
1. From the Schedule/Practice Workflow window, click the **Documents** tab.
2. If required, select the Scope and Dates from the left panel
3. Navigate to **Type: Referral Letter** in the documents grid.

Type	Date	Patient Name	Category	Record Content
Type : PDF	05/31/2018	TESTM, KEVIN M.		File type: PDF/pdf
Type : REFERRAL LETTER	01/02/2019	MALEK, SARA	PSYCHIATRY	
	01/02/2019	MALEK, SARA	DENTIST	

4. Click to highlight a patient.
5. Click the **Chart** button.
6. Click the **Referrals/Trans** button.
7. Click the scanner icon to the left of the referral to be reviewed.

Date	Outside Provider	Note	Status	Record Type	Auth.	Ins. Req. #	Practice Provider
12/10/2018	Rene Blaker	This patient is being referred for further evaluation because of not	PENDING	REFERRAL		0	Susan J. Testdoc, MD
1/25/2018	ABC PEDIATRICS		COMPLETE	TRACKING ENTRY		0	Susan J. Testdoc, MD

- The scanned document appears in the **Manage Documents** window.
- Once the scanned document is reviewed, click the **Mark Reviewed** button.
- Click the **OK + Close** button. You are returned to the Referral / Care Transition List.
- Confirm the referral is highlighted, click the **Respond** button.
- Select the **Response to a referral** radio button. All prior referral information will populate the Response to a Referral window.



Referral/Care Transition Details

Type of referral/care transition:
 Referral to a specialist
 Response to a referral
 Letter/written correspondence
 Tracking entry (care transition)

Status:
 Pending (awaiting response)
 Complete

Medical Documentation | Insurance/Admin

Written date: 12/27/2018 | Flag date: 1/10/2019

Responding prov: SUSAN J. TESTDOC, MD | 305

Response to: RENE BLAKER

Specialty: SPEECH

Facility name: BLAKER ASSOC. SPEECH & LANGUAGE

Address: | Phone: 215-345-8682

City/State/Zip: | Fax:

ICD-9 DX 1: Developmental disorder of speech and language, unsp | F80.9 | Add to PL
 ICD-10 DX 2: | | Add to PL

Response/Findings: [ORIGINAL REFERRAL]>>> [Dated: 12/10/2018] This patient is being referred for further evaluation because of not responding to conventional therapy. <<<END ORIGINAL REFERRAL]

Report contents: | Linked referral: 1936

Internal note:

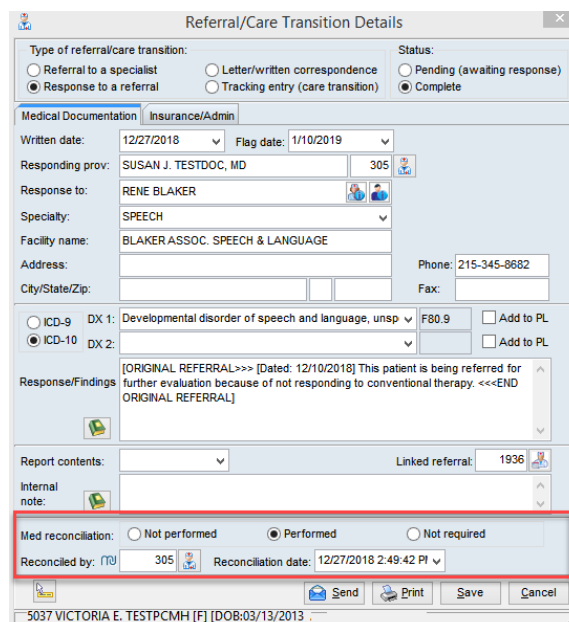
Med reconciliation: Not performed Performed Not required

Reconciled by: ITU | 305 | Reconciliation date: / /

Buttons: Send, Print, Save, Cancel

13. Complete the **Med reconciliation** section:

- Select the **Performed** or **Not required** radio button.
- The **Reconciled by** will default to the user logged into the OP software if Performed was selected. To change the provider or if Not required was selected, click the **Provider** button and select the provider from the list.
- The **Reconciliation date** will default to the current date and time if Performed was selected. To change the date or if Not required was selected, click the dropdown arrow and select the date from the calendar.



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Medical Documentation | Insurance/Admin

Written date: 12/27/2018 | Flag date: 1/10/2019

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Response/Findings: [ORIGINAL REFERRAL]>>> [Dated: 12/10/2018] This patient is being referred for further evaluation because of not responding to conventional therapy. <<<END ORIGINAL REFERRAL]

Report contents: | Linked referral: 1936

Internal note:

Med reconciliation: Not performed Performed Not required

Reconciled by: ITU | 305 | Reconciliation date: 12/27/2018 2:49:42 PM

Buttons: Send, Print, Save, Cancel



Note: If a new medication was prescribed for the patient, you are required to enter the medication in the **Medications** tab of the patient chart.

14. Click the **Save** button. The referral and response records are marked as Complete.

Referral / Care Transition List		Scanned Records					
Date	Outside Provider	Note	Status	Record Type	Auth.	Ins. Req. #	Practice Provider
12/10/2018	Rene Blaker	This patient is being referred for further evaluation because of not	COMPLETE	REFERRAL		0	Susan J. Testdoc, MD
12/27/2018	Rene Blaker	[ORIGINAL REFERRAL->>> [Dated: 12/10/2018] This patient is being	COMPLETE	RESPONSE			Developmental disorder of speech and language, unspecified

15. Close the chart. You are returned to the **Documents** tab.