# OP Patient Portal: Managing Referral Requests

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## About

Referral Request messages sent from the OP Patient Portal to OP are received in the **Unread Portal** tab of the Message Center by all users who have been assigned to the appropriate Message Group in the Practice Portal. Allowing these requests is optional, and must be enabled in the Practice Portal **(Portal Management > Patient Interface > Manage Setup > Portal Features > Allow Referral Requests)**.

Below, you'll find the workflow based on the assumption that Referral Request messages are being received by Practice staff, either the Referral Coordinator or otherwise, who forward them to Providers for approval and task creation before the referral is created. Your Practice's workflow may vary.

## Referral Coordinator/Staff Receiving Referral Request Message Steps

1. Navigate to the **Unread Portal** tab of the Message Center.
2. Select and review the **request message**. A preview of the message is displayed in the lower section of the Message Center window.
3. Select the **Include prior text** checkbox so that the original details of the message received from the portal are included in the message.
4. With the message selected, click the **Forward** button.
5. *(Optional)* Click the **Demographics** tab located vertically in the Message window to confirm the patient's PCP.
6. In the To field, select the patient's PCP or other Provider you'll be sending the message to.
7. *(Optional)* In the Response field, click ahead of the populated text, press **Enter** on your keyboard to move the information down, and add an additional message to the Provider.
8. Confirm the **Completed: remove from all inboxes** radio button is selected so that additional users who received this message have it removed from their inboxes.
9. Click **Send** to forward the message to the Provider.

Once the Provider completes their review and task creation and the task has been completed, it is important to respond to the request message so that the parent is aware of their next steps. To send the appointment/referral details to the portal, click **Reply** from the message, select Web Portal User as the message recipient, and enter the message information in the Response field before clicking **Send**.

## Provider Steps

1. Navigate to the **Unread Phone** tab of the Message Center. This is where portal messages that have been forwarded are displayed.
2. Complete the normal process for reviewing the patient's chart and creating the task for the Referral from either the Orders tab within the message or from the patient's chart.
3. Return to the message window, and proceed with one of the following two options based on your Practice's workflow:

   - **If replying to the staff member who sent the request**: Click the **Reply** button, and leave the To field populated with their name. In the Response field, click ahead of the populated text, press **Enter** on your keyboard to move the information down, and add an additional message to the staff member, such as "Referral approved, task created."
   - **If forwarding request to Referral Department**: Click the **Forward** button, remove the staff member's name from the To field, and select Referral Departments as the recipient. In the Response field, click ahead of the populated text, press **Enter** on your keyboard to move the information down, and add an additional message to the Referral Department.

4. Click **Send** to send the message.