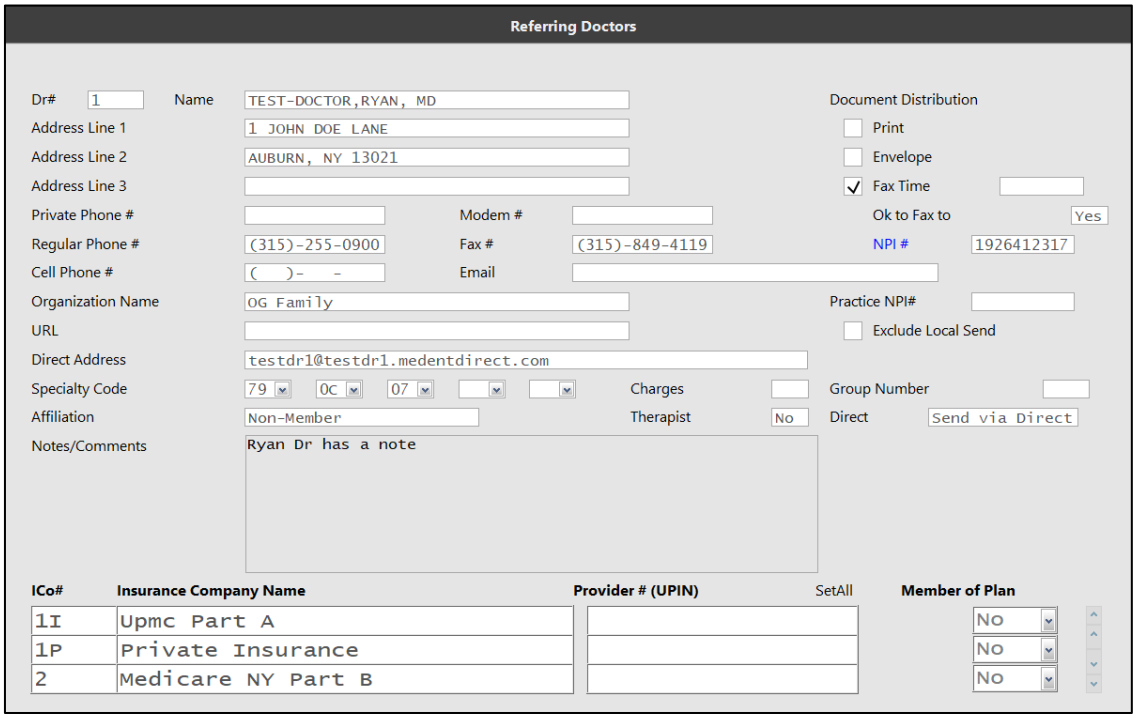
Referrals

Outgoing Referrals Setup

Consultation requests can be made from outgoing referrals. Outgoing referrals are used to send the outgoing referral to the appropriate provider/ specialty/practice. This requires Referring Doctor Setup.

Set Up Referring Doctors/Referring to Practices

- Medical Records > Medical Records Setup > Referring Drs/Referrals > Referring Doctors
- Click **New**.



- **Name**: Enter the doctor's name or practice name.
  a. Doctor's Name Format: Last Name, First Name, Middle Initial, Title. (e.g. Test Jr, Michael P, MD)
  b. Practice Name Example: Community Cardiology

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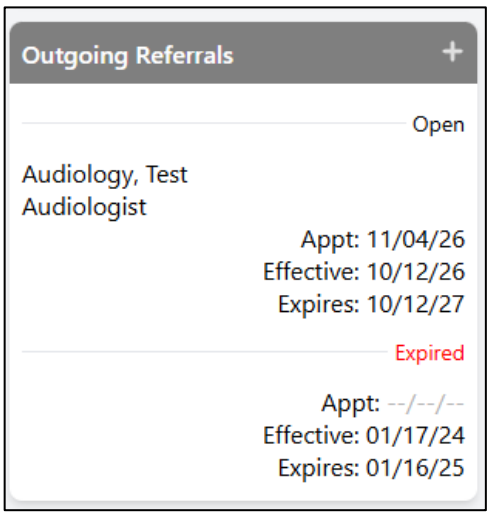
- **Address Line 1**: Enter the Street Address and Suite Number.
- **Address Line 2**: Enter the City, State and Zip.

Note: If there is a PO Box, enter it in Address Line 2 and use Address Line 3 for the City, State and Zip. Otherwise, leave Address Line 3 blank.

- **Regular Phone #**: Enter the Phone Number with (000)000-0000 format.
- **Fax #**: Enter the Fax Number with (000)000-0000 format.
- **NPI #**: Enter the National Provider Identification Number.
- **Direct Address**: Enter the Provider's Direct Address. NOTE: medent usually assigns this based on the NPI #; most practices will not have to add this information.
- **Specialty Code**: Enter the Provider's Specialty Code.
- **Charges**: Set to **No** if the Provider is not in Practice.
- **Group Number**: Group Providers for Reports.
- **Therapist**: Set to **Yes** if Provider is a therapist.

Set Up Outgoing Referrals in Chart View

Outgoing Referrals may be added to the Chart View for each User.



- Medical Records > Patient Chart
- Search for and select the patient.
- In the patient's chart, click **Orders Tab Setup** at the top of the screen.
- Click **Add Area to Chart** .
- Type and select **Outgoing Referrals**.
- Select the column you want this to display in. Use drag and drop to place it where you'd like on the screen.
- Click the checkmark ✔ in the upper left corner to save.

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My Chart Central Setup

My Referrals

Chart Central is configurable so that providers and support staff have easy access to referrals.

- Medical Records > Chart Central
- Click the chevron .
- Select My Preferences and My Chart Central Setup.
- Under Top Row Options, click **My Referral**. This moves it to the Top Row area on the right.
- Under Top Row, select My Referral and click **Edit** to modify.
- Select whether you'd like to **Display Add On**.
  - **None**: No add on will appear.
  - **Date/Time**: Displays date of last referral added.
  - **Item Count**: Displays number of items in this area, based on criteria selected.
- Click **Statuses** and choose from Last Selected, Open or Closed.
- Click **Referral View** and select Outgoing.

Referral Appointment Alert

You can also set up easy access to Referral Alerts on Chart Central. This option is available as a Chart Central button on the bottom section.

In My Chart Central Setup:

- Under Bottom Row Options, click **Referral Appt Alert**.
- Under Bottom Row, select Referral Appt Alert and click **Edit**.
- Change the Display Name, if desired.
- Click **Users** to select specific users to view their Referral Alerts.
- Click **Statuses** and select Created, Scheduled and Sent.

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Referrals for Specific Users

A Referral button may be set up in Chart Central for specific users.

In My Chart Central Setup:

- Under Bottom Row Options, click **Custom Referral**.
- Under Bottom Row, select Custom Referral and click **Edit**.
- Change the Display Name.
- Click **Display Add On** and select from None, Date/Time or Item Count.
- Click **Users** to select which users' Open Referrals you'd like to view.
- Click **Statuses** and select Open or Closed.
- Click **Referral View** and select Outgoing.

Set Up Dr Note (Optional)

You may set up doctor notes to select in outgoing referrals.

- Medical Records > Medical Records Setup > Referring Drs/Referrals > Referrals Setup > Dr Note
- Click New to create a new Dr Note. Click Edit/View to edit or view a Dr Note.

Set Up Reason for Referral Templates (Optional)

Provider or support staff may enter why the referral is being requested. Templates may be set up for specific types of referrals and may pull pertinent clinical information from the patient's chart.

- Medical Records > Medical Records Setup > Referring Drs/Referrals > Referrals Setup > Reason for Referral Templates

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Set Up Referral Reports

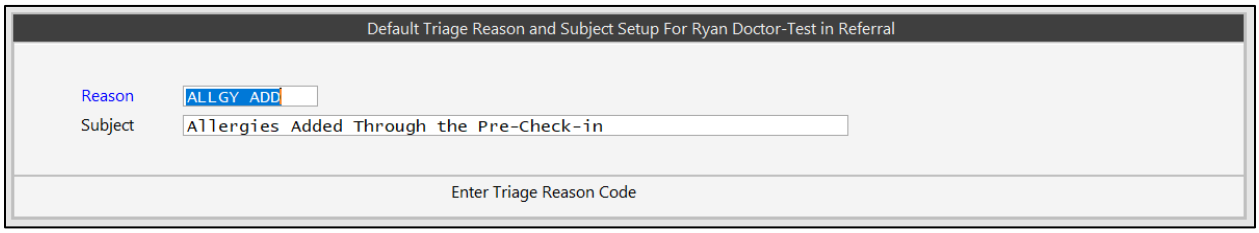
Master Documents must be set up for referral reports.

- Medical Records > Medical Records Setup > Referring Drs/Referrals > Referrals Setup > Referral Reports
- Select all the I-CON documents from the master document list. You can add multiple documents at one time by clicking the ⊕.

Set Up for Referral Default Triage Options (Optional)

You may set up a default triage reason code and subject for each user.

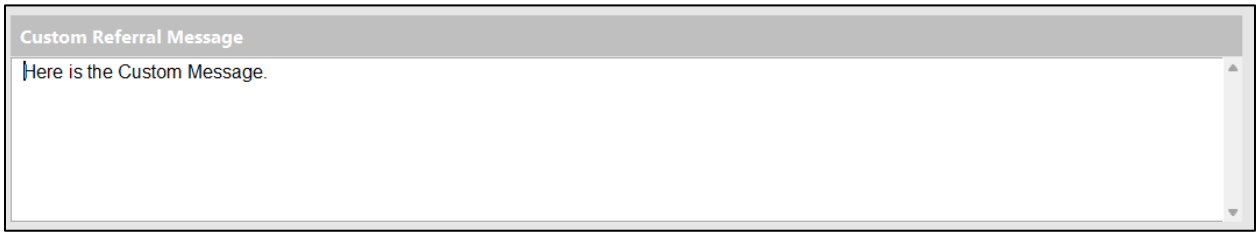
- Medical Records > Medical Records Setup > Referring Drs/Referrals > Referrals Setup > Referral Default Triage Options



Set Up Custom Referral Message (Optional)

This is a message that displays on the printed/faxed/sent/exported referral. This is commonly used for Out-of-Pocket Expenses, such as the New York State Emergency Medical Services and the Surprise Bill law.

- Medical Records > Medical Records Setup > Referring Drs/Referrals > Referrals Setup > Custom Referral Message



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Set Up Prompt for Signature

The user will be prompted for a signature when exiting the referral. This requires security clearance.

- Medical Records > Medical Records Setup > Referring Drs/Referrals > Referrals Setup > Prompt for Signature



Resources

medent manual:

https://www.medent.com/htmlmanual/html/v237/referringdoctorssetdr.html

https://www.medent.com/htmlmanual/html/v237/referralsetuprdr.html

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