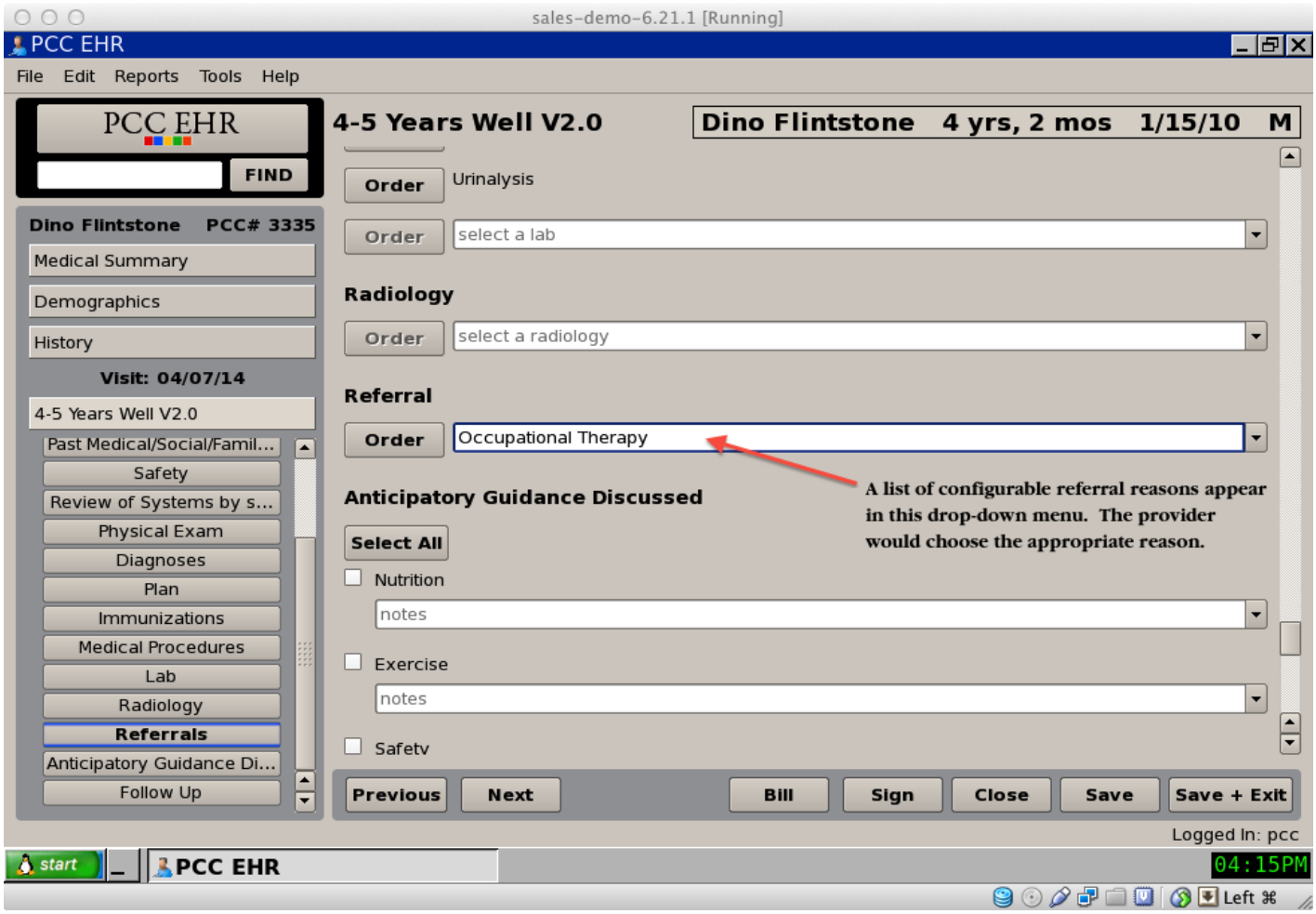
Element 5B: Referral Tracking and Follow-Up

With PCC EHR, referrals orders are initiated by a provider during a patient encounter. When ordering the referral, the clinician first chooses the appropriate referral reason from a drop-down list. In the example below, Dino is being referred to an occupational therapist for management of probable autism. The clinician chooses "Occupational Therapy" and clicks the "Order" button to order the referral:

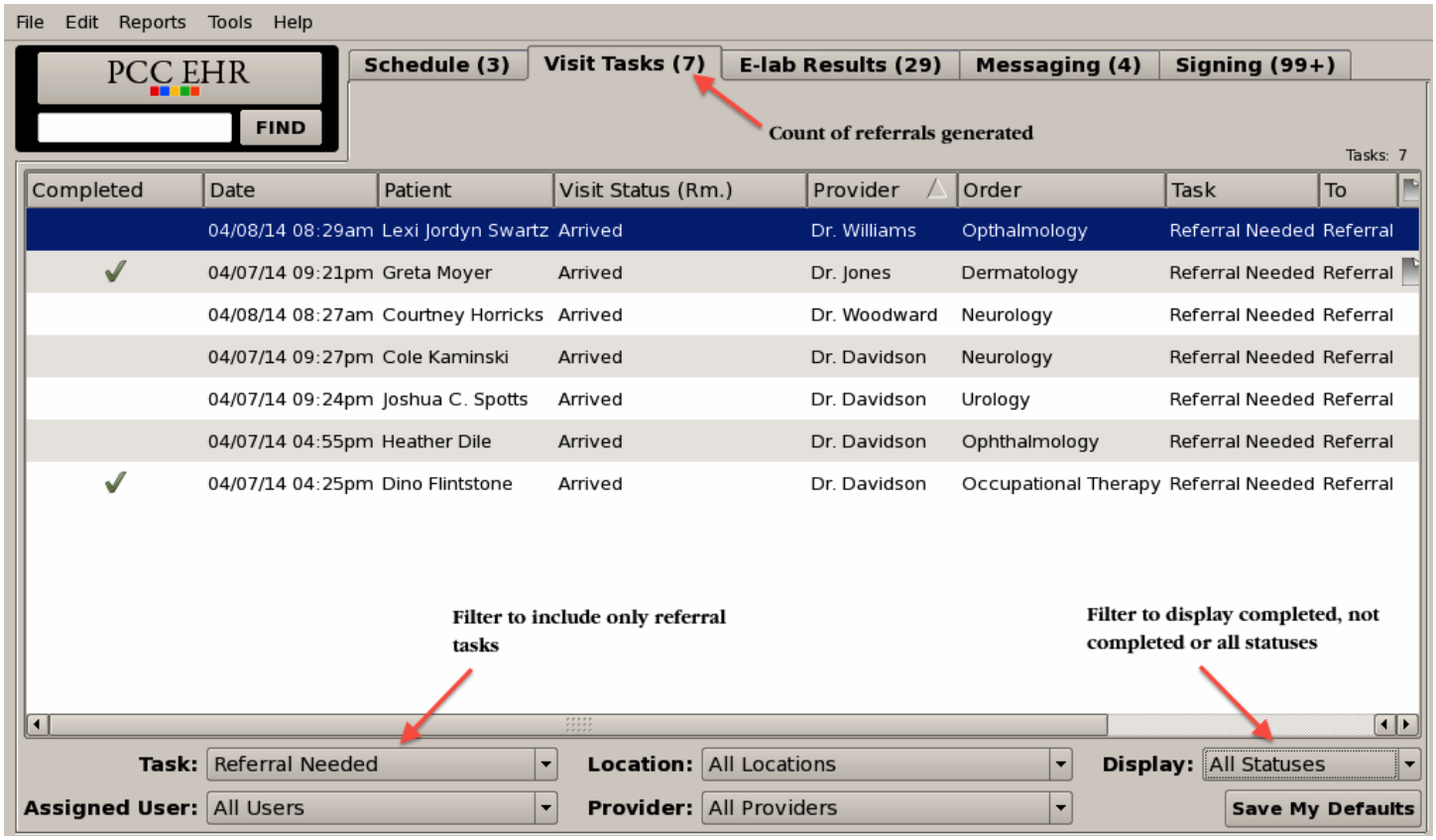


Once ordered, the clinician indicates a "Referral Needed" task to the referral clerk to initiate the referral, adding a note specifying what the referral is for:

In the above example, the referral task is assigned to the generic "Referral" user (but can be assigned to a specific user). This "Referral Needed" task is automatically added to the "Visit Tasks" queue in PCC EHR.

This visit tasks queue is used for tracking the status of referrals and represents an electronic log of outstanding (and/or completed) referrals.

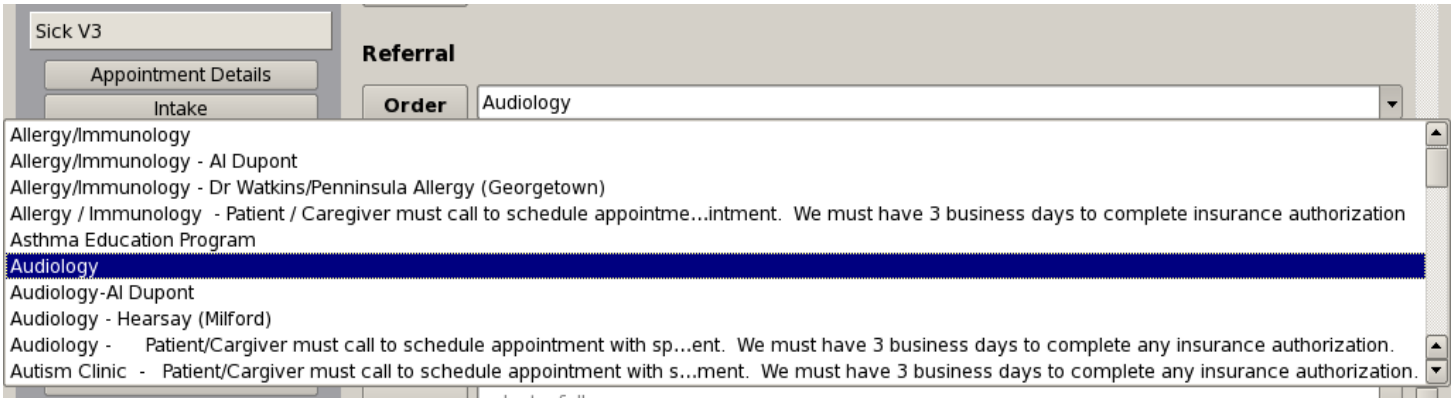
The screen shot below shows the ability for PCC EHR to identify a list of referrals ordered. The user has the ability to filter the list to include only "not completed" referrals that need to be processed, or all referrals (as we have done in this example). A count of referral tasks is included at the top.



By filtering these visit tasks to include only "Referral Needed" tasks, the referral coordinators can focus just on referrals that need to be initially processed.

Factor 1: Giving the consultant or specialist the clinical reason for the referral and pertinent clinical information.

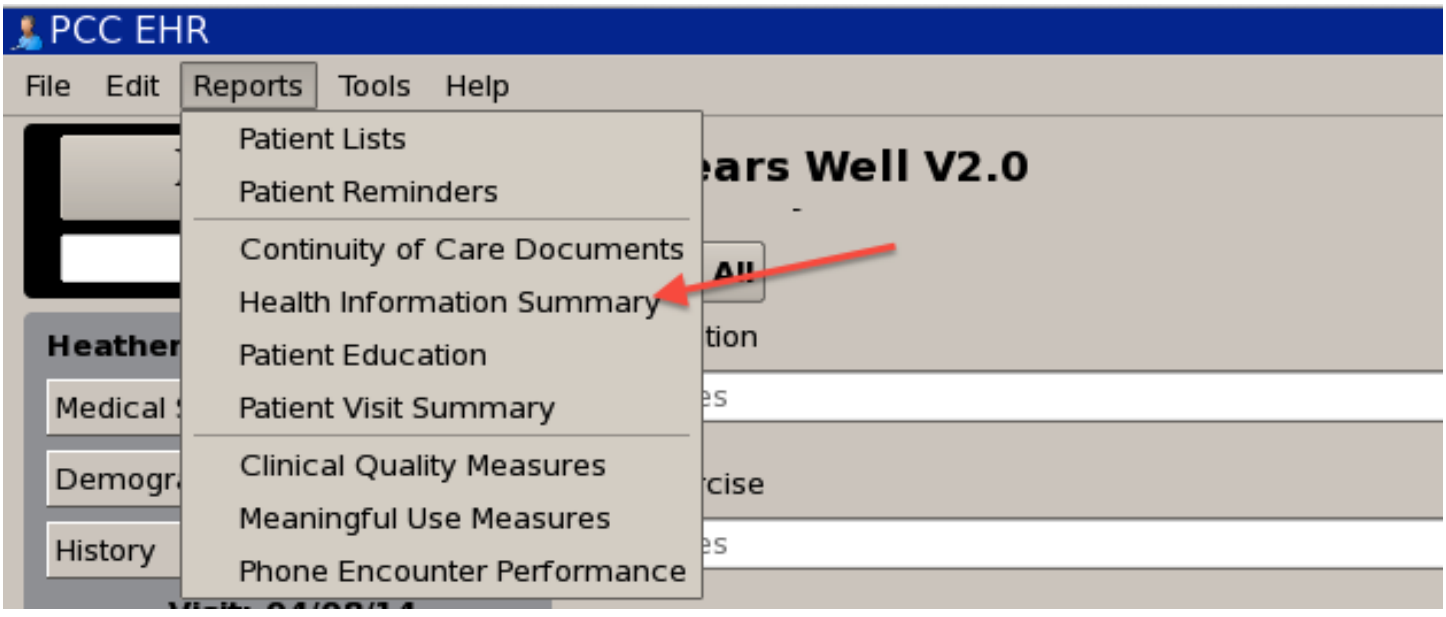
When ordering a referral, the clinician specifies the reason and, if desired, the actual specialist they want to refer the patient to from a drop-down list:



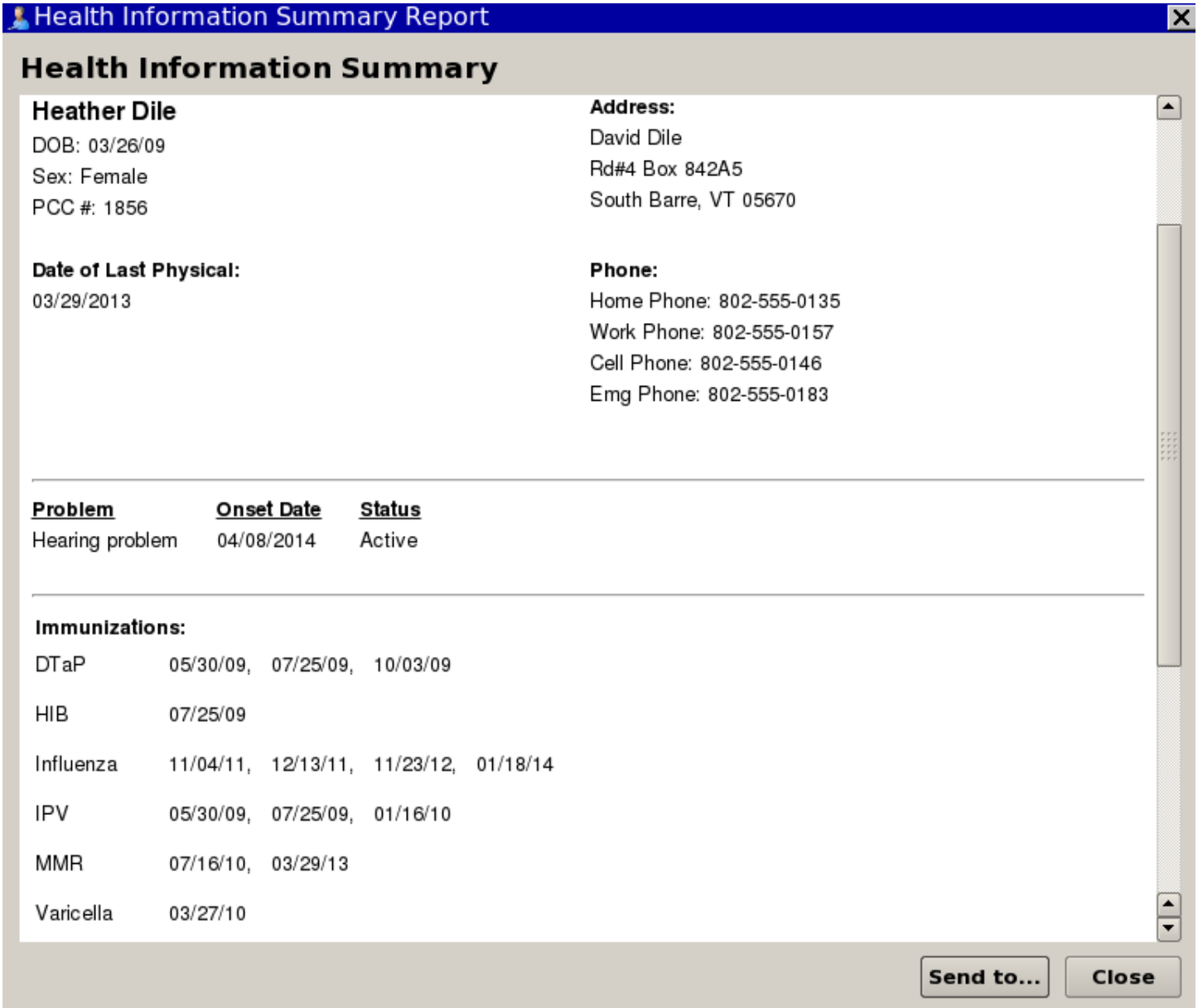
The practice has the ability to configure a specific list of local referral options if they would like to specify the specialist and any specific insurance authorization rules or other information they want to include for that particular specialist..

When ordering the referral the clinician has the ability to enter the urgency, general purpose of the referral, and any followup communication requests in a free text note field:

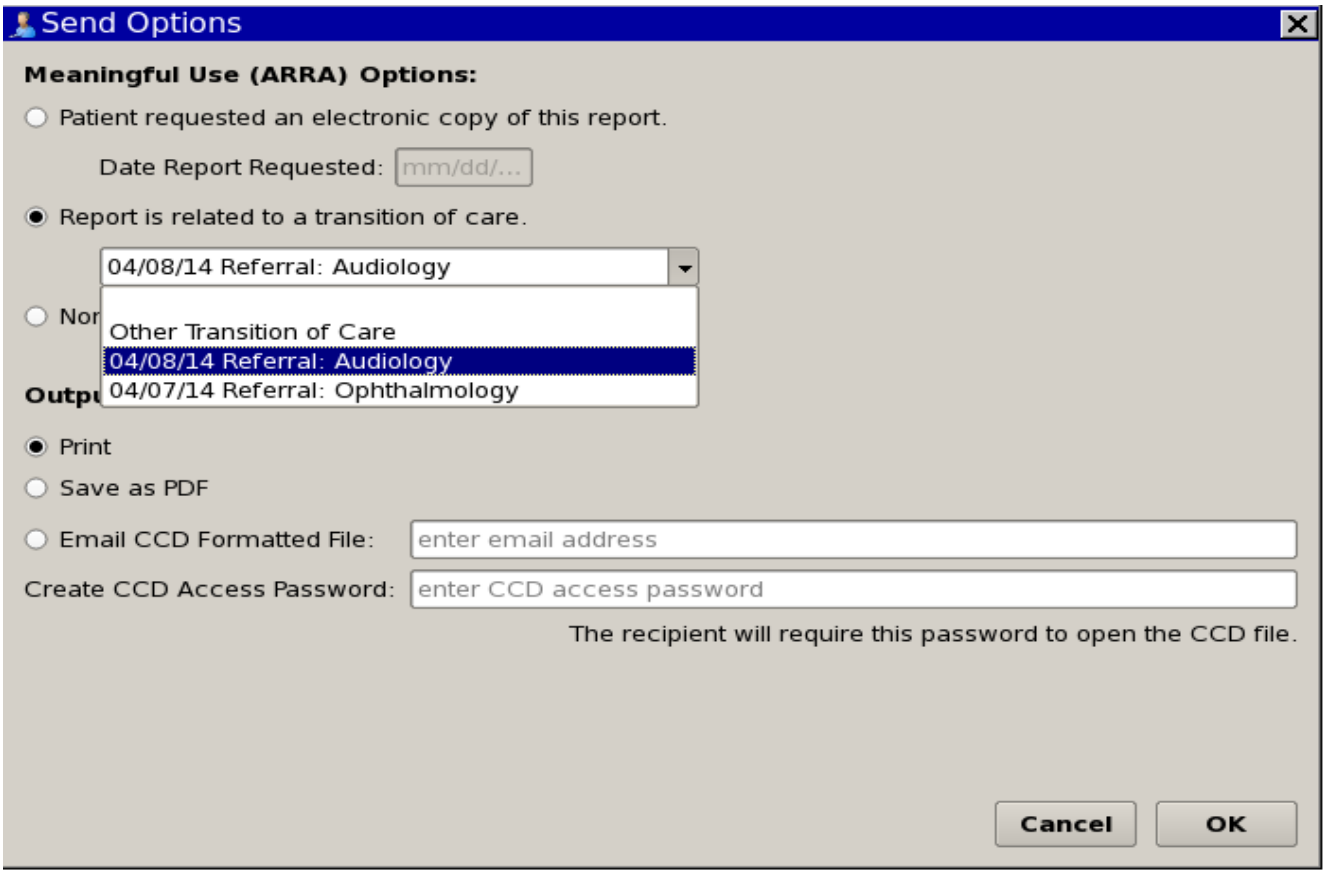
The referral clerk will see the referral task on the visit task queue and process the referral, generating the relevant clinical information to send to the specialist. Typically, the patient "Health Information Summary" report is printed, saved as a .pdf to be given electronically to the patient or specialist, or emailed as a CCD-formatted file:



The health information summary includes patient demographics, a problem list, medication allergies, medication history, immunizations, labs, medical tests, and screenings as defined by the Meaningful Use requirements:



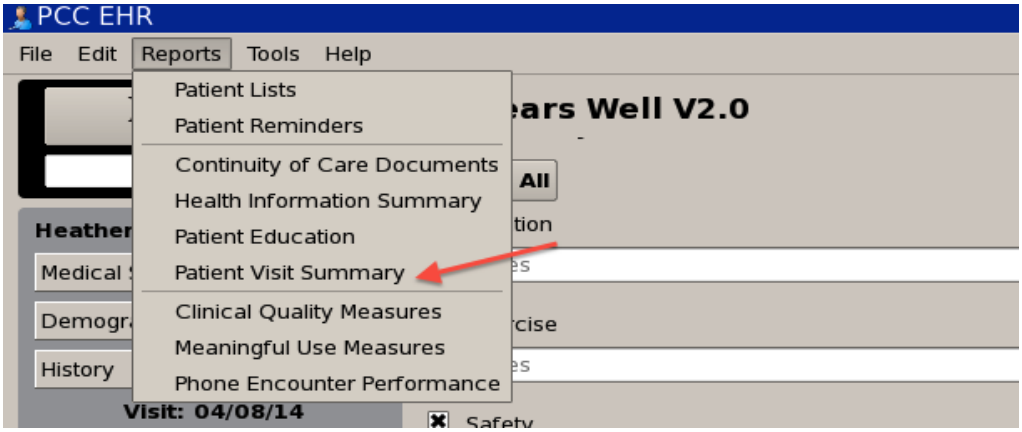
The user would click the “Send to...” button in the bottom right to print, save, or email the report. When generating the health information summary, the user should specify the summary is related to a transition of care, specifying the relevant referral the summary is being printed for. This allows the practice to get credit for the Meaningful Use measure related to providing a summary of care for referrals or transition of care:



This report should be provided to the patient, faxed, or mailed to the specialist in a timely manner. Delivery method should be based on the urgency of the referral, specialist procedures and/or competency of the patient or parent to provide the document to the specialist.

The report has the capability to be sent electronically to the specialist as a CCD file by selecting the "Email CCD Formatted File:" option and specifying an email address and access password.

Additionally (or alternatively), the practice has the ability to generate a visit summary to send to the specialist if the referral is being made during a routine check-up or office visit. This visit summary includes a fully-documented chart note for the selected visit and can also be printed, saved electronically as a .pdf, or emailed as a CCD-formatted file:



Patient Visit Summary Report

Patient Visit Summary

(800) 722-7708

Heather Dile
DOB: 03/26/09
Sex: Female
PCC #: 1856

Scheduled Visits:
04/09/2014 12:30pm 5yr Well Visit

Date of Last Physical:
03/29/2013

Visit Summary for 04/08/2014

Fred Jones, M.D.
Pediatrics of PCC Doctor's Office
4-5 Years Well V2.0

Diagnoses
Hearing problem

Vitals

Weight: 34 lbs 5 oz	(15.564 kg)	13th percentile(CDC)
Height: 40 in	(101.60 cm)	9th percentile(CDC)
BMI: 15.1 kg/m2		48th percentile(CDC)

Visit Summary for: 04/08/14 4-5 Years Well V2.0 Send to... Close