

PCMH 4: Provide self-care support and Community Resources

Element 4B: Provide Referrals to Community Resources

Factor 2: Tracks referrals provided to patients/families

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, Pebbles is being referred to a specific occupational therapist for management of probable autism. The clinician chooses “Occupational Therapy” specifying the office they are referring to and clicks the “Order” button to order the referral:

The screenshot displays the PCC EHR interface for a patient named Pebbles Flintstone, 10 years and 1 month old, on 3/08/04. The patient's chart is titled "4-5 Years Well V2.0". The interface includes a search bar with a "FIND" button and a sidebar with navigation options such as "Medical Summary", "Demographics", "History", and "Referrals". The main content area shows the "Referral" section, where the "Order" button is highlighted, and the referral reason is set to "Occupational Therapy - Childs Play by the Bay (Lewes)". Below this, the "Anticipatory Guidance Discussed" section is visible, with checkboxes for "Nutrition", "Exercise", and "Safety", each followed by a "notes" field. At the bottom of the interface, there are buttons for "Previous", "Next", "Bill", "Sign", "Close", "Save", and "Save + Exit".

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:

Visit: 05/06/14

4-5 Years Well V2.0

Appointment Details
Intake
Medical Test
History
Past Medical/Social/Famil...
Safety
Review of Systems by s...
Physical Exam
Diagnoses
Plan
Immunizations
Medical Procedures
Lab
Radiology
Referrals

Referral

EDITING

Occupational Therapy - Childs Play by the Bay (Lewes) **Ordered**

Note: concerns about probable autism

Signature Required Canceled Include on Patient Reports

TASK Referral Needed TO Referral

NOTE enter task notes here

Task Completed AT mm/dd/... 12:00am BY enter user name

ADD TASK DISCARD CHANGES SAVE ORDER

Order select a referral

Previous Next Bill Sign Close Save Save + Exit

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.

File Edit Reports Tools Help

PCC EHR

Schedule (3) **Visit Tasks (7)** E-lab Results (29) Messaging (4) Signing (99+)

Count of referrals generated

Tasks: 7

Completed	Date	Patient	Visit Status (Rm.)	Provider	Order	Task	To
	04/08/14 08:29am	Lexi Jordyn Swartz	Arrived	Dr. Williams	Ophthalmology	Referral Needed Referral	
✓	04/07/14 09:21pm	Greta Moyer	Arrived	Dr. Jones	Dermatology	Referral Needed Referral	
	04/08/14 08:27am	Courtney Horricks	Arrived	Dr. Woodward	Neurology	Referral Needed Referral	
	04/07/14 09:27pm	Cole Kaminski	Arrived	Dr. Davidson	Neurology	Referral Needed Referral	
	04/07/14 09:24pm	Joshua C. Spotts	Arrived	Dr. Davidson	Urology	Referral Needed Referral	
	04/07/14 04:55pm	Heather Dile	Arrived	Dr. Davidson	Ophthalmology	Referral Needed Referral	
✓	04/07/14 04:25pm	Dino Flintstone	Arrived	Dr. Davidson	Occupational Therapy	Referral Needed Referral	

Filter to include only referral tasks

Filter to display completed, not completed or all statuses

Task: Referral Needed Location: All Locations Display: All Statures

Assigned User: All Users Provider: All Providers Save My Defaults

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.