From the Office of Clinical Informatics

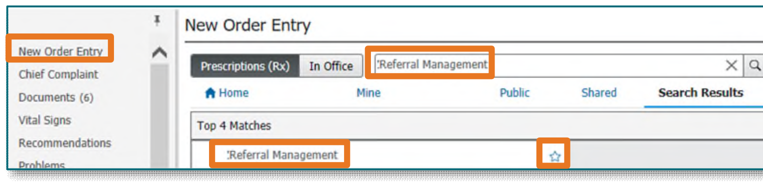
Cerner CommunityWorks
Referral Order Process

October 31, 2023

The following is an instruction on the Referral Order Process for Ambulatory Providers.

Ordering a Referral

From the Workflow MPage.

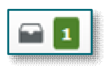


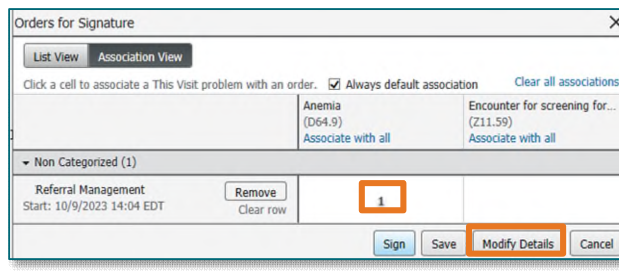
STEP 1: Navigate to the **New Order Entry** component.

STEP 2: In the search bar, begin typing **Referral Management** and select the **Referral Management** order.

NOTE: **Select the ☆ to save as a favorite. Once saved, access the order under Mine where order favorites are located.**

STEP 3: Click the **Orders for Signature** icon.

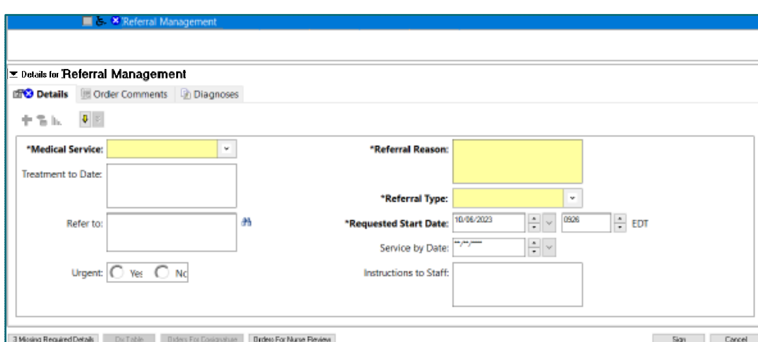




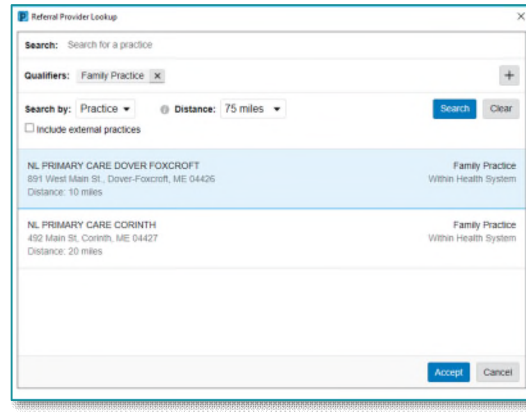
- Associate the order with a diagnosis, if available.
- Click **Modify Details**.

STEP 4: The orders scratchpad will display.

- Single-click the **Referral Management** order.
  - The order details display in the lower pane.
- Fill in the details as appropriate.



- Select the appropriate **Medical Service** from the dropdown.
- Enter **Referral Reason**.
  - If requesting **E-Consult**, enter that at the beginning of the referral reason.
- Enter **Referral Type**.
- In the **Refer To** field, click the binoculars to search for appropriate providers, as needed.



- In the search field, enter **practice** to locate.
  - Qualifiers, such as specialty, can be added to the search by clicking the + (plus) button.
- Click **Search.**
- Select the desired provider/practice from the search results.
- Click **Accept**.

<u>NOTE</u>: Required fields will display in yellow; however, filling in additional fields further assists the referral specialist in appropriately scheduling the patient.

<u>NOTE</u>: For E-Consults, remember to obtain verbal consent from the patient and add the E-Consult auto text within the Assessment and Plan of the office visit note.

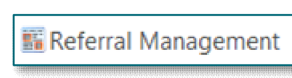
<u>STEP 5</u>: When all necessary details of the order have been completed, click **Sign**.

- A task will then be routed to referral management for staff to arrange an appointment for the patient.

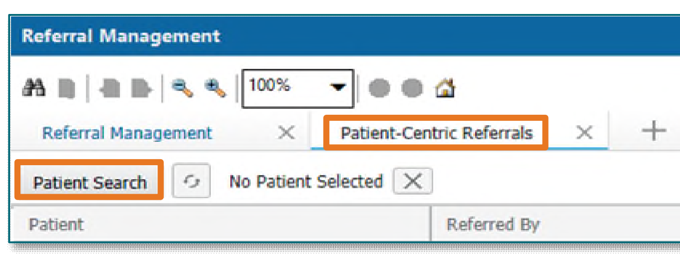
<u>NOTE</u>: There are two ways to check the status of referrals.

<u>Patient-Centric Referrals</u>

Ability to search for any patient's referrals.



<u>STEP 1:</u> Click **Referral Management** in the toolbar.



<u>STEP 2:</u> Click the **Patient-Centric Referrals** tab.

<u>STEP 3:</u> Click **Patient Search**.

<u>STEP 4</u>: Enter the patient information to locate the patient.

<u>STEP 5</u>: Select **patient**.

<u>STEP 6</u>: Click **OK**.

- All the patient's referrals will show with important information contained under the headers. This includes the Referred To location/practice and the status of the referral case.

Referrals Component

Ability to see referrals on a specific patient, from Workflow MPage in the chart.

STEP 1: Click the **Menu** icon.

STEP 2: Click **Components.**

STEP 3: Click the **Referrals** component to checkmark.

NOTE: To disable components from view, click the previously selected component to uncheck.

STEP 4: Click and drag components to fit your preferred workflow.