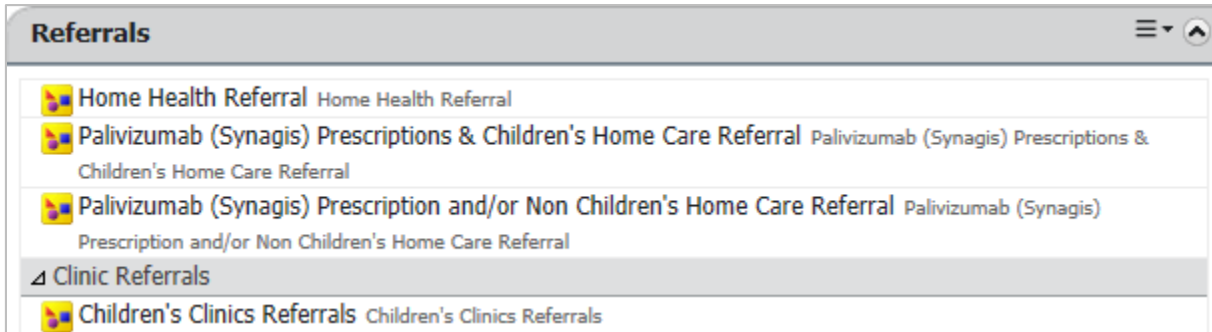


## Referral Management: Clinician Workflow

### Placing a Referral Order

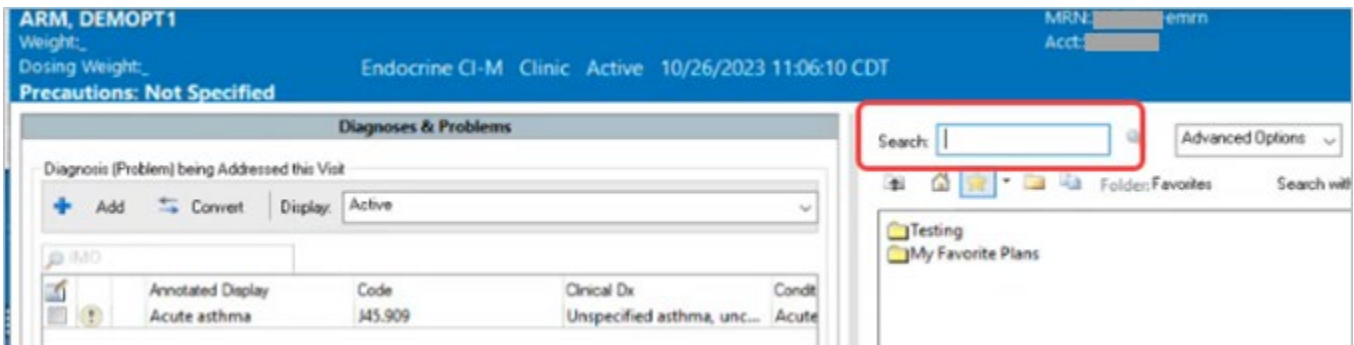
1. Go to the **Referrals** section in Quick Orders and select the **Children's Clinics Referrals** order set.



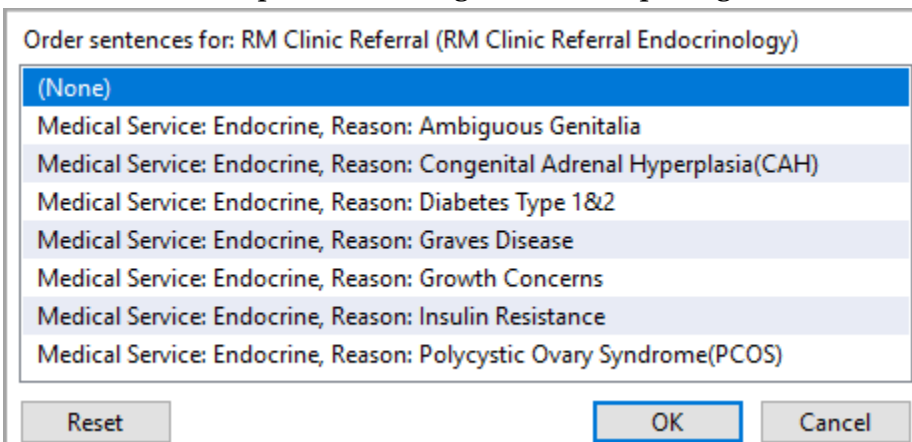
Or

Go to the **Orders** component in the Workflow Summary and click **+Add** to add a new order.

- Search for the clinic referral order.



**Note:** Once a referral order is selected, an **Order sentences** window displays. Select an appropriate order sentence or (None) prior to clicking **OK** and completing the order details.



2. Complete the Order details.

**Note:** Fields highlighted in yellow are required.

**Details for RM Clinic Referral (RM Clinic Referral Endocrinology)**

Details | Order Comments | Diagnoses

Order details

- Medical Service [Endocrine]
- Referral Reason** [Endocrine]
- Referral Type
- Refer to Clinic**
- Requested Start Date/Time [2/6/2024 8:39 CST]
- Priority
- Diagnosis
- Instructions to Scheduling Staff
- CONFIDENTIAL Order
- External

Detail values

3. **Refer to Clinic** is a required field. To complete this field, click the binoculars.

**Note:** The **Refer to Clinic** field does not default the practice specified in the order name and will need to be searched every time a new referral order is placed. Practice is a minimum requirement. If the specific provider is unknown, you can refer to the practice only. The **Refer to Clinic** cannot be favorited.

**Details for RM Clinic Referral (RM Clinic Referral Endocrinology)**

Details | Order Comments | Diagnoses

Order details

- Medical Service [Endocrine]
- Referral Reason [Turner Syndrome]
- Referral Type
- Refer to Clinic**
- Requested Start Date/Time [12/20/2023 12:33 CST]
- Priority
- Diagnosis
- Instructions to Scheduling Staff
- CONFIDENTIAL Order

Detail values

4. This opens the **Referral Provider Lookup** window.

- The **Search by** dropdown initially defaults to **Provider** and may need to be switched to **Practice**. However, the next time you conduct a search, your last **Search by** preference (i.e., **Practice** or **Provider**) will be retained.
- The qualifier in the provider/practice lookup defaults based on the **Referral Reason** and restricts the lookup to only providers/practices in that specialty. The qualifier may need to be removed to display additional results.

**Referral Management: Clinician User Guide**

**Internal Search**

The qualifier for the specialty will default and internal practices or providers display depending on what **Search by** dropdown option is selected. Select the appropriate clinic or provider and click **Accept**.

**Note:** Children's Health Network clinics external to the Minneapolis and St. Paul campuses are not included in internal searches.

**Referral Provider Lookup**

**Search:** Search for a practice

**Qualifiers:** Endocrinology

**Search by:** Practice **Distance:** -- **Search** **Clear**

Include external practices

Endocrine CI-M -- Distance: --	Endocrinology Within Health System 1 Provider Available
--------------------------------------	---

**Accept** **Cancel**

**External/CHN Search**

Select **Include external practices** to include external and CHN sites in the search. Select the appropriate clinic or provider and click **Accept**.

**Referral Provider Lookup**

**Search:** Search for a practice

**Qualifiers:** Allergy and Immunology

**Search by:** Practice **Distance:** -- **Search** **Clear**

Include external practices

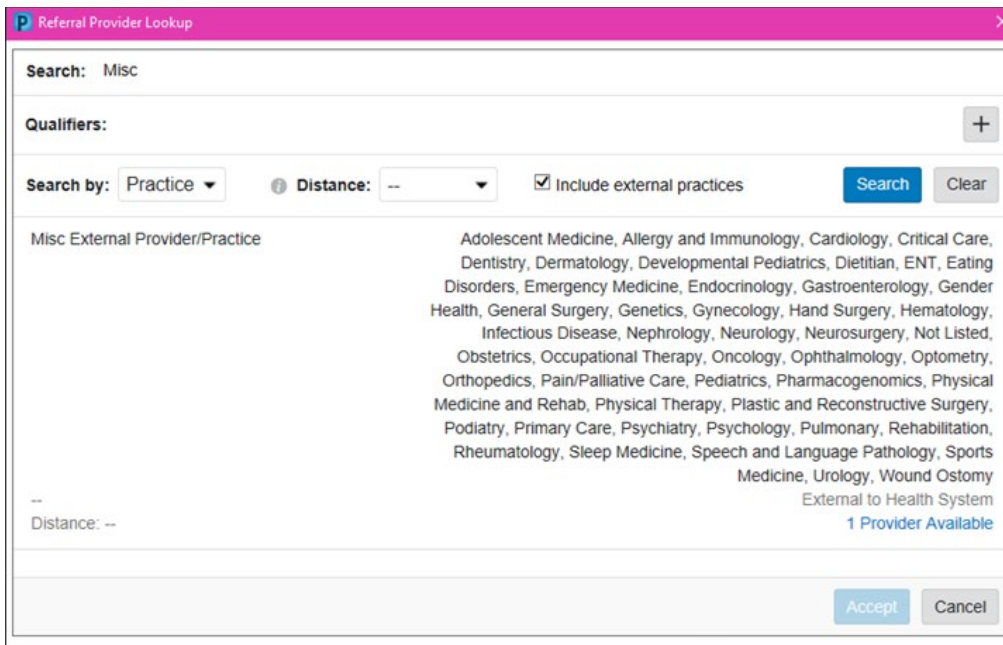
Advancements in Allergy and Asthma 12450 Wayzata Blvd, Suite 215, Minnetonka, MN 55305 Distance: --	Allergy and Immunology External to Health System 4 Providers Available
Allergy & Asthma Specialists, PA 825 Nicollet Mall, Suite 1149, Minneapolis, MN 55402 Distance: --	Allergy and Immunology External to Health System
Allergy and Asthma Center of Minnesota 2480 White Bear Ave, Suite 104, Maplewood, MN 55109 Distance: --	Allergy and Immunology External to Health System
Eisenstadt Allergy and Asthma 825 Nicollet Mall, Suite 204, Minneapolis, MN 55402 Distance: --	Allergy and Immunology External to Health System

**Accept** **Cancel**

**Referral Management: Clinician User Guide**

External Unknown Provider or Practice Search

Click the **Include external practices** checkbox. Select Misc External Providers/Practice and click **Accept**.



5. **Sign** the order.
6. Refresh the Orders page. The referral order will display in a **Completed** status and a referral case will be added to a worklist in Referral Management.  
**Note:** A completed referral order cannot be modified, the order will need to be voided and a new referral order will need to be entered.
7. Navigate to the **Referrals** component in the Workflow Summary to view a list of that patient's referrals and statuses.

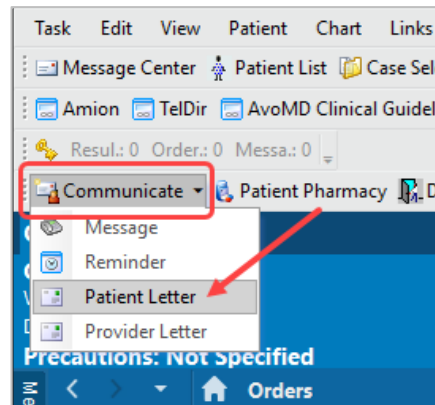
Written Date	Medical Service	Reason	Refer To	Status	Priority
▼ In-Progress					
Dec 15, 2023	Sleep Medicine	ADHD/ADD/Learning	Immunology CI-S	Pending Acceptan...	Routine (Non Urgent)
Dec 15, 2023	Sleep Medicine	ADHD/ADD/Learning	Immunology CI-S	Pending Acceptan...	Routine (Non Urgent)
Dec 15, 2023	Infectious Disease	test	Infectious Diseas...	Pending Acceptan...	Routine (Non Urgent)
Dec 15, 2023	Orthopedics	Acute Fracture	Endocrine CI-M	Pending Acceptan...	Routine (Non Urgent)
Dec 15, 2023	Psychology	Adjustment or Grief/Loss (Specify)	Psychology CI-M	Pending Acceptan...	Routine (Non Urgent)
Dec 15, 2023	Psychiatry	Inattention/Poor Concentration	Psychiatry CI-M	Pending Acceptan...	Routine (Non Urgent)
Dec 15, 2023	Sleep Medicine	Sleep Disordered Breathing	Endocrine CI-M	Accepted	Routine (Non Urgent)
Dec 15, 2023	Cardiology	test	Endocrine CI-M	Pending Acceptan...	Routine (Non Urgent)
Dec 13, 2023	Allergy	Allergy	Midwest Ear Nose...	Sent	Routine (Non Urgent)
Nov 27, 2023	Endocrine	Precocious Puberty	Endocrine CI-M	Pending Acceptan...	Urgent (ASAP)

**Referral Management: Clinician User Guide**

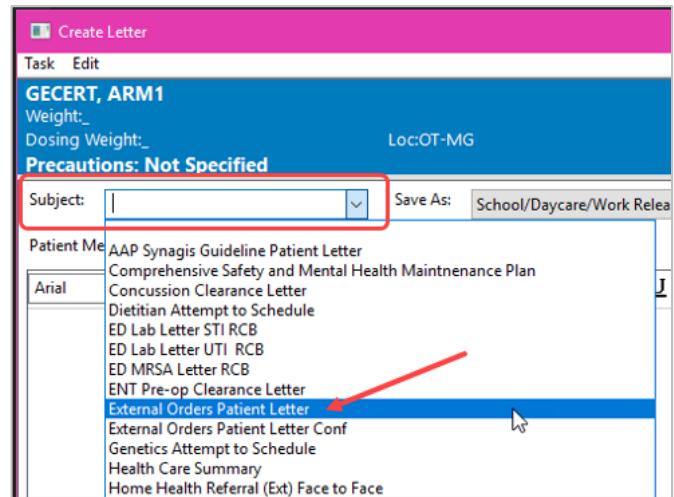
**Print External Referral Order**

If the referral order needs to be printed, follow these steps:

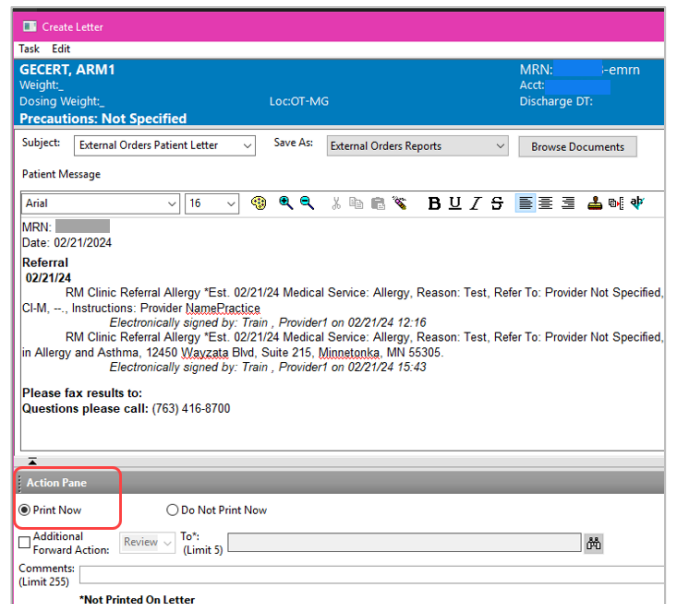
1. Open the patient's chart, click the **Communicate** drop-down, and select **Patient Letter**.



2. Click the **Subject** drop-down and select **External Orders Patient Letter**.



3. The body of the patient letter displays. In the Action Pane, **Print Now** is selected.



4. Click **OK** to print.